



COMPETITIVE ASSESSMENT



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INTRODUCTION

There is a simple truth about communities: they will change over time no matter what we do. The most successful places understand that they can have a say in the matter by adopting shared strategic visions that inspire action.

Spartanburg County began its strategic journey in 2016 when it developed the first OneSpartanburg Vision Plan. The strategy was launched on January 24, 2017, with 42 investors committing \$4.5 million over five years to fund implementation of four key drivers, talent, economy, image and place aimed at advancing a core goal: to raise levels of prosperity and improve quality of life for all Spartanburg County residents.

While implementation of the Vision Plan over the course of the past five years has largely been successful, leaders in Spartanburg understand that their work has only just begun; bold action must be their path forward. The community must maintain the momentum of the 2016 Vision Plan but also update this ambitious 1.0 strategy with an even grander new vision that can inspire the community, attract new investment, and take Spartanburg to the next level of success. OneSpartanburg Vision Plan 2.0 will be a bold, innovative five-year community and economic development strategy driven by data and community feedback.

With the pandemic and its economic uncertainty entering a new phase and once-in-a-generation opportunities from federal government and philanthropic investment emerging in Spartanburg, the timing for a new vision is perfect. The next step on Spartanburg County's journey begins now.

ABOUT BROAD RIPPLE STRATEGIES

Broad Ripple Strategies has been selected as Spartanburg County's partner to develop the OneSpartanburg Vision Plan 2.0 BRS represents nearly 30 years of experience crafting community, workforce, and economic development strategies that build consensus, drive investment, and get results. Our team has helped more than 60 clients develop 90+ strategies for community and economic development, talent and workforce sustainability, and quality of place. Our team partnered with Spartanburg County on the development of the first OneSpartanburg Vision Plan and has previous experience working with the Upstate South Carolina Alliance.

PROJECT OVERVIEW

The OneSpartanburg Vision Plan 2.0 will be developed through a four-phase process that began in August 2021 and will conclude in February 2022. It is led by a dynamic Steering Committee of key community leaders. This group is tasked with sharing their perspectives and insights, reviewing research and input findings, considering the guidance the BRS team provides, and making key decisions about the priorities and strategies that will define the new Vision Plan. The 49 leaders selected for the Steering Committee reflect the diverse opinions, perspectives, and backgrounds of the Spartanburg community and its residents.

Phase 1: Stakeholder Engagement

Input from the people who live and work in a community is an essential component of a strategic planning process. The BRS team worked with OneSpartanburg, Inc. to develop a robust engagement process consisting of interviews, focus groups, and an online survey that garnered 2,800 responses.

Phase 2: Competitive Assessment and Implementation Evaluation

This phase provides key insights into Spartanburg’s competitive position and helps the Steering Committee make informed decisions on the key issues and opportunities that will shape the new Vision Plan. The Competitive Assessment synthesizes existing research, quantitative data, and qualitative input to evaluate Spartanburg as a place to live, work, and do business. It is complemented by a concise Implementation Evaluation that identifies key “lessons learned” from the activation of the first OneSpartanburg Vision Plan.

Phase 3: OneSpartanburg Vision Plan 2.0

This phase will result in the development of a next-level Vision Plan for Spartanburg that blends ongoing initiatives that warrant continuation with new priority programs and investment. The Vision Plan 2.0 will establish strategic priorities for the next five years for OneSpartanburg, Inc. and its partners. Creation of Vision Plan 2.0 will occur in three phases: a high-level outline or framework of goals and objectives; a draft strategy; and final plan. Each phase will incorporate review and comment from the Steering Committee, whose work will be completed with the final approval of Vision Plan 2.0.

Phase 4: Implementation Guidelines

While the OneSpartanburg Vision Plan 2.0 will determine “what” Spartanburg will do strategically for the next five years, the Implementation Guidelines will prescribe “how” that will be accomplished. It will analyze and establish implementation costs and resources, lead and support entities for priority strategies, launch dates and project phasing, and performance measures to track progress towards goal attainment. The Guidelines be developed in consultation with OneSpartanburg, Inc., the Vision Plan Advisory Board, and other partners that will play a direct role in activating the strategy.

Methodology

Building on existing research and qualitative input, BRS evaluated a wide range of economic, socioeconomic, demographic, and quality of life indicators from various public and proprietary sources. Spartanburg County was used as the primary research geography.

To provide necessary context to the trends and issues discussed, Spartanburg County's performance was analyzed relative to state and national trends, as well as three communities with which it competes for jobs and talent. These comparison counties were selected in consultation with OneSpartanburg, Inc. staff and the Steering Committee. They are Hamilton, TN (Chattanooga), Madison, AL (Huntsville), and Forsyth, NC (Winston-Salem). All data for comparison communities is provided at the county level.

EXECUTIVE SUMMARY

From a community and economic development perspective, Spartanburg County has had much to celebrate in recent years. The community's population has grown rapidly thanks to an influx of new residents moving to the community from other places. Core sectors of the local economy have boomed, adding thousands of jobs and bringing new wealth into the community. Overall standards of living have improved and poverty rates have declined as household and per capita incomes have risen. And quality of place improvements are evident in Downtown Spartanburg and around the County.

Like nearly all communities around the world, the Covid-19 pandemic caused tremendous loss and hardship in Spartanburg County. The community's economy, however, proved relatively resilient to the resulting global recession. Key community partners came together to form the Bringing Back the Burg Task Force to coordinate certain aspects of Spartanburg County's pandemic response and to monitor data indicators to assess recovery. These data indicate that consumer activity (measured by sales tax revenue) has bounced back above pre-pandemic levels while other metrics are well on their way to recovery.

Overall, even when accounting for the impact of the pandemic, Spartanburg County finds itself in a stronger position today relative to early 2016 when development of the first OneSpartanburg Vision Plan began. But leaders in Spartanburg County understand that their work is not done. Various data indicators and input from people who live and/or work in Spartanburg County revealed numerous opportunities and challenges that can be addressed through strategic action.

The competitive issues that emerged from research and the stakeholder engagement process can be grouped into five overarching themes:

- Input participants strongly desire a more diverse local economy, with “knowledge-based” and corporate jobs balancing strengths in manufacturing and logistics and increased entrepreneurial and small business activity expanding community wealth.
- Educational attainment remains one of Spartanburg County's biggest competitive challenges and is a major barrier to economic diversification; the community must continue efforts to attract talented individuals to the community and strengthen the “homegrown” talent pipeline.
- While many “topline” measures of economic well-being have improved in recent years, stakeholders said many residents are not sharing in this success, with inequities particularly notable when disaggregating data by race and ethnicity.
- Continued investment and place-based enhancements have helped Downtown Spartanburg's transformation into a major competitive asset; stakeholders are eager to see more quality of place improvements both in Downtown and throughout the community.

- Spartanburg County has experienced tremendous population growth in recent decades, and input participants said there is a need to ensure that the community is adequately prepared for even more growth in the future, particularly as it relates to providing a sufficient and varied supply of housing.

Each of these themes corresponds to one of the five “Chapters” that make up this Assessment. These Chapters summarize key findings from data analysis and themes from the stakeholder engagement process to develop a narrative around the major competitive issues impacting Spartanburg County and identify strategic implications for the Steering Committee to consider as it formulates the Vision Plan 2.0. The five Chapters are titled:

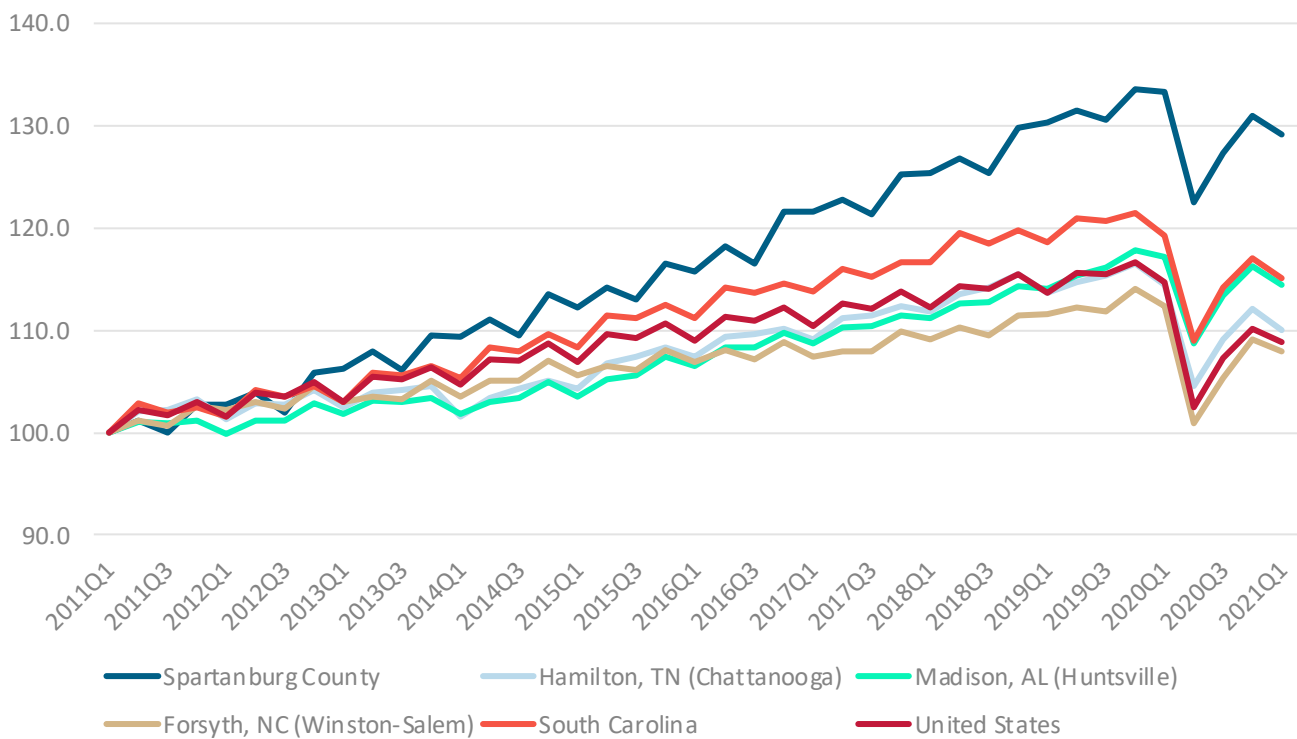
- Chapter 1: Diversifying a Strong Economy
- Chapter 2: Growing a Talented Workforce
- Chapter 3: Ensuring Broadly Shared Prosperity
- Chapter 4: Enhancing Quality of Place
- Chapter 5: Keeping Pace with Growth

The Assessment concludes with a short Appendix, the **Implementation Evaluation**. This section provides a high-level overview of the implementation of the first OneSpartanburg Vision Plan from its launch in January 2017 to the present. It seeks to identify areas where implementation activities have been successful, examples where clear progress remains to be achieved, and challenges and opportunities encountered during implementation.

CHAPTER 1: DIVERSIFYING A STRONG ECONOMY

For much of the past decade, Spartanburg County has experienced strong economic growth. Between the first quarters of 2011 and 2021, the number of jobs based in the county grew by 29.1 percent, or three times the national average. While some of this growth can likely be attributed to a growing population boosting demand in sectors such as health care, Spartanburg County’s employment growth rate was more than double that of Madison, AL (Huntsville), a community that added residents at roughly the same rate between 2010 and 2020. **Simply put, Spartanburg is a standout among all comparison geographies in terms of its recent economic growth.**

FIGURE 1: QUARTERLY INDEX OF EMPLOYMENT CHANGE, NOT SEASONALLY ADJUSTED (Q1 =100)



SOURCE: JOBSEQ; BRS

As seen in the preceding index, the Covid-19 pandemic had an acute impact on the global economy, with steep drops in employment seen in all comparison geographies between February and April 2020. While much recovery has occurred since that time, as of August 2021 the United States still had 3.5 percent fewer jobs than it did on the eve of the pandemic according to the Federal Reserve Bank of St. Louis. The most recent employment data available at the county level is from the first quarter of 2021. As shown in Figure 2, **Spartanburg County experienced a smaller decline in employment in the early stages of the pandemic and is closer to its pre-pandemic employment level than most comparison geographies.**

FIGURE 2: PANDEMIC IMPACT AND RECOVERY, NOT SEASONALLY ADJUSTED

Geography	Employment change, February to April 2020	Feb. 2021 employment as % of Feb. 2020 employment
Madison, AL (Huntsville)	-9.6%	98.3%
Spartanburg County	-10.9%	97.6%
South Carolina	-12.6%	96.9%
Forsyth, NC (Winston-Salem)	-12.1%	96.1%
Hamilton, TN (Chattanooga)	-11.7%	95.7%
United States	-13.9%	94.3%

SOURCE: BUREAU OF LABOR STATISTICS; BRS





















Spartanburg County is renowned as a manufacturing and logistics hub, and this reputation clearly shines through in industry sector data. Manufacturing is the largest industry sector by total employment in Spartanburg County. It accounts for more than one in five jobs in the community and has a location quotient of 2.64, meaning it is more than two and a half times as concentrated in the local economy relative to the national average. **Spartanburg County’s manufacturing sector added more than 6,400 jobs between the first quarters of 2016 and 2021, an increase of 23.7 percent. Nationally, manufacturing employment decreased by 2.9 percent during this time.**

Nationally, the fastest-expanding sector of the economy both locally and nationally was transportation and warehousing, reflecting the growing importance of logistics and e-commerce, trends that accelerated during the pandemic. **While the national transportation and warehousing sector grew by 16.1 percent between the first quarters of 2016 and 2021, the sector grew by 40.9 percent in Spartanburg County, accounting for nearly 3,000 new jobs.**

The strength of Spartanburg County’s manufacturing and logistics sectors is a testament to an asset base that few other communities can match. The community has a strong production workforce, a prime location with excellent highway and rail connectivity, the Greer Inland Port, growing logistics operations, etc.

However, among other sectors that “export” goods and services to other regions and bring new wealth into the community, Spartanburg County’s economic performance is not as strong. These include information, finance and insurance, professional services, and management of companies and enterprises (which includes corporate headquarter operations). Each of these “knowledge-based” sectors is much less concentrated in Spartanburg County’s economy, and, with the exception of professional services, all grew slower than the national average between the first quarters of 2016 and 2021.

FIGURE 3: SPARTANBURG COUNTY INDUSTRY SECTOR COMPOSITION, Q1 2021

Sector	Location Quotient	Employment	# Chg.	% Chg.	US % Chg.	Avg. Ann. Wage
Manufacturing	 2.64	33,498	6,407	23.7%	-2.9%	\$60,813
Health Care & Social Assistance	 0.90	20,488	4,215	25.9%	3.9%	\$56,004
Retail Trade	 0.99	15,696	-730	-4.4%	-6.4%	\$32,349
Accommodation & Food Services	 1.01	11,197	-172	-1.5%	-19.6%	\$18,104
Educational Services	 0.86	10,659	-278	-2.5%	-4.1%	\$48,827
Transportation & Warehousing	 1.36	10,281	2,985	40.9%	16.1%	\$49,399
Admin. & Support & Waste Mgmt.	 1.04	10,029	649	6.9%	-4.5%	\$34,869
Construction	 0.90	8,141	1,163	16.7%	6.9%	\$57,388
Wholesale Trade	 1.23	7,236	242	3.5%	-5.6%	\$59,348
Other Services (except Public Admin.)	 0.94	6,129	-22	-0.4%	-8.0%	\$32,816
Professional, Scientific, & Tech. Svcs.	 0.49	5,363	625	13.2%	7.3%	\$63,366
Public Administration	 0.48	3,679	79	2.2%	2.5%	\$43,755
Finance & Insurance	 0.50	3,271	-128	-3.8%	4.6%	\$73,076
Real Estate & Rental & Leasing	 0.67	1,784	461	34.9%	0.6%	\$50,572
Mgmt. of Companies & Enterprises	 0.74	1,759	9	0.5%	4.2%	\$127,277
Arts, Entertainment, & Recreation	 0.55	1,270	-140	-9.9%	-24.8%	\$18,879
Information	 0.28	858	-436	-33.7%	-4.0%	\$52,551
Utilities	 0.92	768	192	33.3%	-1.7%	\$71,415
Ag., Forestry, Fishing & Hunting	 0.32	699	-17	-2.4%	-4.8%	\$16,734
Mining, Quarr., & Oil/Gas Extraction	 0.26	144	7	4.8%	-26.9%	\$54,120
Total - All Industries		152,950	15,112	11.0%	-2.3%	\$49,272

SOURCE: JOBSEQ; BRS

Note: Figures represent a four-quarter moving average and may not sum due to rounding. Location quotient (LQ) is a calculation that compares local versus national employment for a particular sector. An LQ of 1.0 means an equivalent local versus national share but anything above 1.0 may indicate a local advantage. The higher the LQ the greater the local specialization in that sector.

GROWING KNOWLEDGE-BASED AND CORPORATE JOBS

One of the most prominent themes from the input process is that stakeholders in Spartanburg County want to see more “knowledge-based” and corporate jobs. This is consistent with one of the major themes from the first Vision Plan process. Input participants view these jobs as critical to expanding economic opportunities, growing wealth, and supporting a diverse and resilient economy.

The table shown in Figure 4 on the following page shows the occupational composition of the jobs based in Spartanburg County. Unlike the industry sector data shown on the preceding page, this table categorizes employment based on the duties and responsibilities of the job as opposed to the type of business in which the job is based. **It reveals that knowledge-based jobs are indeed relatively less concentrated in the local economy.** The community has comparatively fewer jobs in occupational categories such as administrative support, management, computer and mathematical, and business and financial operations, all of which had location quotients well below 1.0. On the other hand, production occupations – the jobs that involve making or assembling something in a manufacturing process – and transportation and material moving occupations are highly concentrated in Spartanburg County relative to the United States.

When looking at the growth rate of knowledge-based and corporate occupations in Spartanburg County, however, a much more positive picture emerges. Between the first quarters of 2016 and 2021, occupations such as management, business and financial operations, and computer and mathematical occupations grew faster than their corresponding national averages. These occupations also grew faster than total employment in Spartanburg County.

The fact that knowledge-based and corporate occupations grew rapidly while many knowledge-based and corporate industry sectors experienced flat or even negative growth points to a key finding: **many knowledge-based and corporate jobs in Spartanburg County are embedded in other sectors of the economy, including “blue collar” industries such as manufacturing.** For instance, as of the first quarter of 2021, JobsEQ estimated that Spartanburg County’s manufacturing sector directly provided nearly 8,100 jobs in knowledge-based and corporate occupational groups such as administrative support, engineering, and management.

This represents one potential pathway to expand Spartanburg County’s knowledge-based and corporate job opportunities: “diversifying through strength.” Some stakeholders said they would like to see the community take a proactive approach in encouraging existing manufacturing and logistics firms to expand knowledge-based and corporate jobs at their Spartanburg County locations. Input participants also said they would like to see the community attract manufacturing and logistics projects with headquarter operations or other knowledge-based components such as research and development.

FIGURE 4: SPARTANBURG COUNTY OCCUPATIONAL SECTOR COMPOSITION, Q1 2021

Occupation Group	Location Quotient	Employment	# Chg.	% Chg.	US % Chg.	Avg. Ann. Wage
Production	2.60	23,095	3,856	20.0%	-6.9%	\$42,700
Transportation & Material Moving	1.36	17,893	3,322	22.8%	3.8%	\$37,900
Office & Administrative Support	0.92	17,860	1,046	6.2%	-6.4%	\$38,700
Sales & Related	0.99	14,480	-578	-3.8%	-8.2%	\$38,500
Food Preparation & Serving Related	1.04	11,427	-245	-2.1%	-17.1%	\$23,500
Healthcare Practitioners & Technical	0.96	8,790	1,575	21.8%	5.8%	\$75,800
Management	0.72	7,480	858	13.0%	5.3%	\$106,600
Educational Instruction & Library	0.83	7,054	-227	-3.1%	-4.6%	\$54,600
Installation, Maintenance, & Repair	1.15	6,746	646	10.6%	-1.5%	\$47,100
Construction & Extraction	0.92	6,600	916	16.1%	1.5%	\$43,900
Healthcare Support	0.87	6,049	1,612	36.3%	8.2%	\$28,600
Business & Financial Operations	0.60	5,426	735	15.7%	10.1%	\$73,400
Bldg. & Grounds Cleaning & Maintenance	0.87	4,301	142	3.4%	-7.7%	\$28,500
Architecture & Engineering	1.19	3,154	554	21.3%	1.9%	\$83,200
Personal Care & Service	0.74	2,780	20	0.7%	-11.8%	\$28,600
Community & Social Service	0.84	2,309	122	5.6%	1.4%	\$48,200
Computer & Mathematical	0.47	2,305	337	17.1%	11.4%	\$72,500
Protective Service	0.54	1,796	102	6.0%	-1.4%	\$40,300
Arts, Design, Entertain., Sports, & Media	0.64	1,720	66	4.0%	-6.3%	\$47,500
Life, Physical, & Social Science	0.57	815	161	24.7%	6.9%	\$73,100
Legal	0.47	636	61	10.6%	4.2%	\$90,300
Farming, Fishing, & Forestry	0.23	235	32	16.0%	-0.5%	\$36,200
Total		152,950	15,112	11.0%	-2.3%	\$47,300

SOURCE: JOBSEQ; BRS

Note: Note: Figures represent a four-quarter moving average and may not sum due to rounding. Location quotient (LQ) is a calculation that compares local versus national employment for a particular occupation. An LQ of 1.0 means an equivalent local versus national share but anything above 1.0 may indicate a local advantage. The higher the LQ the greater the local specialization in that occupation.

To complement a “diversifying through strength” approach, Spartanburg County stakeholders said they also wish to see additional growth in knowledge-based and corporate operations that are not connected to the region’s core manufacturing and logistics industries. Said one individual, “We promote a lot of manufacturing and that (sector is) growing, but young professionals want to be able to move up in careers and those (knowledge economy) jobs aren’t always here.”

Input participants specifically cited headquarter operations, professional services providers, technology and life sciences firms, and back-office operations as sectors in which they would like to see additional growth. There are, however, several barriers to growth in these sectors. Most importantly, **Spartanburg County’s educational attainment rates and talent pipeline, which will be discussed in the next Chapter, are a major competitive challenge, particularly to growing jobs in industry sectors that require a highly educated workforce.**

Additional competitive barriers to knowledge-based and corporate job growth discussed by stakeholders include the following:

- **A lack of Class A office space.** Stakeholders familiar with real estate market conditions said that there are virtually no significant blocks of Class A office space available in Spartanburg County at the time of this report.
- **A need to optimize state and local incentives.** Input participants said state and local job incentives are well-suited for sectors such as manufacturing but could be improved to aid attraction of headquarter operations and other knowledge-based firms.
- **A lack of “executive” housing.** Stakeholders said Spartanburg County lacks high-end housing options that are sometimes weighed as part of corporate site selection processes.
- **A need to improve external perceptions of Spartanburg County as an office market.** Input participants said Spartanburg County’s reputation as a manufacturing and logistics hub, while welcome in some contexts, can be a challenge for attracting knowledge-based and corporate jobs.

Spartanburg County does have some competitive strengths for knowledge-based and corporate jobs, including a rapidly improving central business district, strong population growth, and a location within the Upstate South Carolina region, which is home to more than 1.5 million residents.

Stakeholders within the economic development field said that Spartanburg County’s most promising path to expanding knowledge-based and corporate jobs outside the manufacturing and logistics sector would entail **targeting small but established firms in larger markets that are capitalized and ready for growth but that may be priced out of more expensive markets in the Southeast and Mid-Atlantic.**

ENTREPRENEURSHIP AND SMALL BUSINESS SUPPORT

Increasing the number of knowledge-based and corporate jobs in Spartanburg County represents one pathway to expanding opportunities for residents to build wealth and thrive. Another important approach is supporting a robust entrepreneurial ecosystem and small business support network.

Several data indicators reveal that the level of entrepreneurial and small business activity in Spartanburg County is relatively low compared to national averages. As shown in Figure 5, Spartanburg County has proportionally fewer business establishments with fewer than 10 employees. Additionally, the community has a smaller share of its total employment in businesses with fewer than 20 employees.

Indicators of new business formation also lag. Spartanburg County has a smaller share of jobs in business establishments that formed within the past five years. Workers in Spartanburg County are also less likely to be self-employed. Self-employed individuals are typically sole proprietors, independent contractors, and individuals with part-time businesses who may eventually incorporate their operations and hire employees.

An analysis of the following data indicators over time also reveals that Spartanburg County’s performance held steady with or worsened relative to the national average during the most recent five years for which data are available.

FIGURE 5: SELECTED SMALL BUSINESS INDICATORS

Data Indicator	Spartanburg County	United States	% point difference
% of business establishments with 0-9 employees (2019)	68.9%	72.6%	-3.7%
% of total employment in businesses with 0-19 employees (2020)	13.7%	17.4%	-3.7%
% of employment in businesses 0-5 years old (2020)	8.2%	10.4%	-2.2%
% of workers who are self-employed (2020)	4.9%	6.2%	-1.3%

SOURCE: U.S. CENSUS BUREAU COUNTY BUSINESS PATTERNS AND QUARTERLY WORKFORCE INDICATORS; JOBSEQ; BRS

Entrepreneurs and small business owners contacted through the stakeholder engagement process gave mixed feedback about Spartanburg County’s entrepreneurial ecosystem and small business support systems. Some described a small but highly supportive ecosystem where small business owners and entrepreneurs frequently help one another. Other stakeholders suggested that part of the challenge is simply making individuals more aware of existing resources. Said one individual, “The most important thing Spartanburg County can do is simply make the small business community more aware of grant and funding opportunities available in addition to support and guidance during the startup and growth phases.”

Entrepreneurs and small business owners identified several barriers to starting and growing a business in Spartanburg County that could be addressed through strategic action. These include:

- Difficulty accessing capital
- A lack of a true “front door” or central hub for entrepreneurship
- Limited availability of co-working spaces
- Difficulty finding quality, affordable office spaces
- Limited availability of high-speed internet access in many parts of Spartanburg County
- A relative lack of support services for firms that are capitalized and are past the true “startup” stage

In addition to these challenges applicable to all entrepreneurs and small business owners in Spartanburg County, input participants said that minorities – Black entrepreneurs and small business owners in particular – face additional barriers. According to these stakeholders, Spartanburg County has a relatively small Black business community, which can make it difficult for aspiring Black entrepreneurs to connect with potential mentors and access capital. Said one individual, “We are really in a development stage when it comes to the Black business community.”

This input is supported by data. Figure 6 shows data for both “employer businesses” – firms with employees on payroll – and “nonemployer businesses” which include sole proprietors and independent contractors. In both cases, Spartanburg County has fewer Black-owned businesses on a per capita basis relative to the United States, and these businesses have lower annual revenues than the national average.

FIGURE 6: BLACK-OWNED EMPLOYER AND NONEMPLOYER BUSINESSES, 2017

Data Indicator	Spartanburg County	United States	Difference
Employer firms (businesses with paid employees)			
Black-owned employer firms per 1,000 Black residents	1.5	3.1	-1.6
Annual revenue per Black-owned firm (in ths.)	\$501	\$1,031	-\$530
Non-employer firms (sole proprietors, etc.)			
Black-owned non-employer firms per 1,000 Black residents	52.0	73.5	-21.5
Annual revenue per Black-owned non-employer firm (in ths.)	\$19.5	\$22.2	-\$2.7

SOURCE: U.S. CENSUS BUREAU ANNUAL BUSINESS SURVEY (ABS) AND NONEMPLOYER STATISTICS BY DEMOGRAPHICS (NES-D); U.S. CENSUS AMERICAN COMMUNITY SURVEY; BRS

Nonemployer firms are particularly important because they represent a common “onramp” into business for aspiring entrepreneurs. When adjusting for population size, the number of nonemployer businesses in Spartanburg County owned by White, non-Hispanic residents was within 95 percent of the national average. **The number of Black-owned nonemployer businesses, however, was nearly 30 percent below the national average. So while there is a need to enhance Spartanburg County’s overall entrepreneurial ecosystem and small business support systems, data suggest that the community would benefit from an approach that seeks to help more Black and minority residents start and grow businesses.**

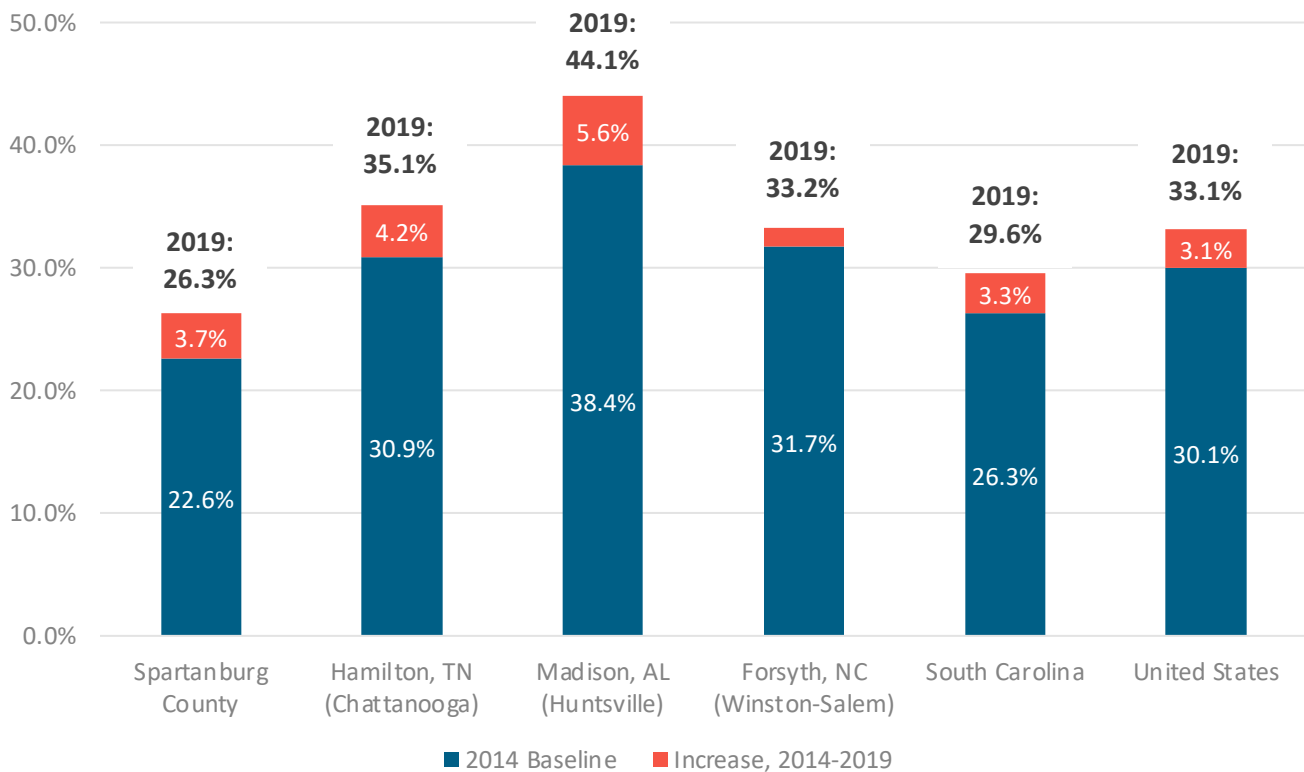
Stakeholders said there are existing programs and resources seeking to promote minority entrepreneurship and small business growth, particularly in the City of Spartanburg. These include the Amplify residential accelerator program, Start:ME Spartanburg, and several efforts around easing access to capital. However, some input participants said awareness of these resources could be improved. One individual said, “There is a disconnect in our community. Resources are available but people who need them don’t know how to get them. We need liaisons, connectors.”

CHAPTER 2: GROWING A TALENTED WORKFORCE

A talented workforce is the most important factor influencing a community’s economic success and prosperity. Businesses across all sectors of the economy consider educational attainment rates among their top site selection factors; **this is especially true for the type of knowledge-based and corporate jobs that stakeholders in Spartanburg County desire.** Additionally, there is a strong link between educational attainment and earning potential, along with a host of other individual and population-level measures of well-being.

During the first One Spartanburg Vision Plan process, low educational attainment rates emerged as one of the biggest competitive challenges in Spartanburg County. As of 2014, just 22.6 percent of adults aged 25 and over had received at least a bachelor’s degree, 7.5 percentage points below the national average. By 2019, the most recent year for which data are available, this figure had increased to 26.3 percent. As shown in Figure 7, this gain of 3.7 percentage points has helped slowly narrow the gap between Spartanburg County and the United States.

FIGURE 7: CHANGE IN BACHELOR’S DEGREE ATTAINMENT FOR AGES 25+, 2014 TO 2019



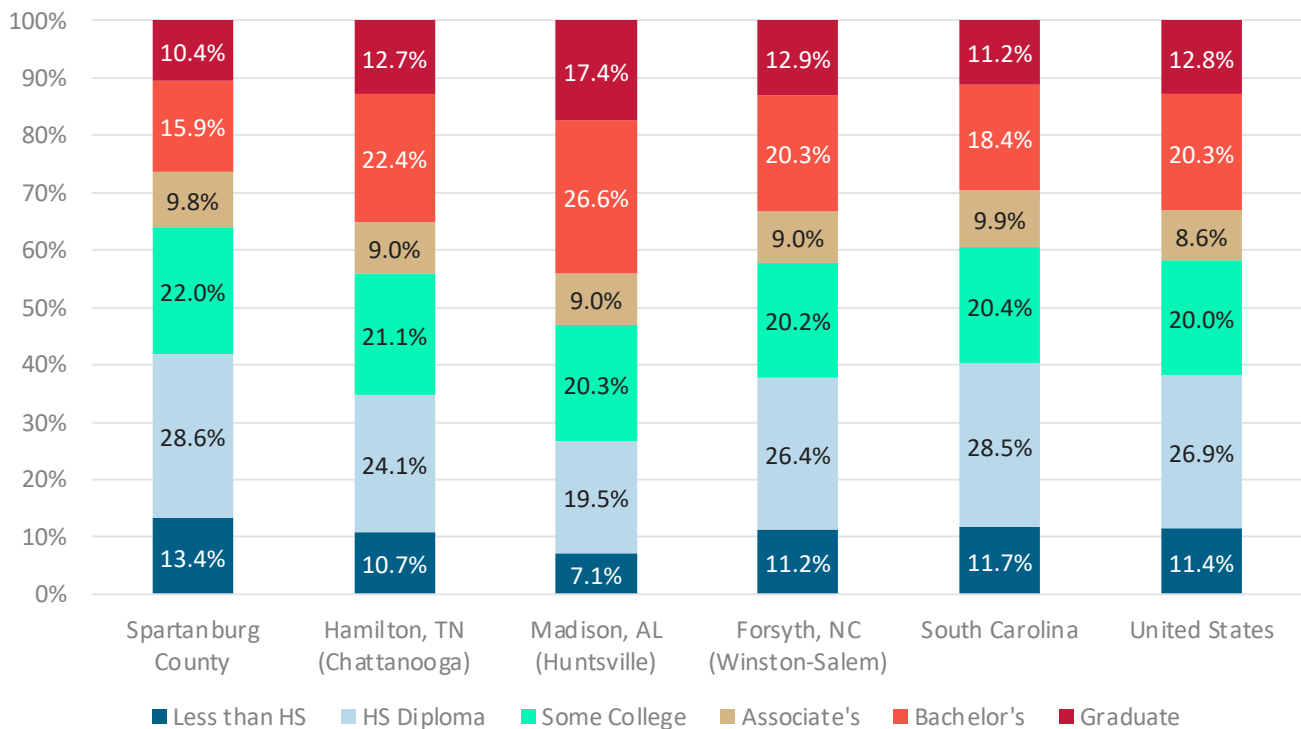
SOURCE: U.S. CENSUS BUREAU AMERICAN COMMUNITY SURVEY 1-YEAR ESTIMATES; BRS

However, comparison communities Hamilton, TN (Chattanooga) and Madison, AL (Huntsville) posted even

stronger percentage point gains in bachelor’s degree attainment on top of baseline levels that were already much higher than Spartanburg’s. In other words, **the four-year degree attainment gap between Spartanburg County and some high-performing regions remains large and growing.**

In addition to lagging bachelor’s and advanced degree attainment rates, Figure 8 shows that Spartanburg County also has the largest proportion of adults whose highest level of educational attainment is a high school diploma or equivalency and the largest proportion of adults who did not complete high school.

FIGURE 8: EDUCATIONAL ATTAINMENT FOR AGES 25+, 2019



SOURCE: U.S. CENSUS BUREAU AMERICAN COMMUNITY SURVEY 1-YEAR ESTIMATES; BRS

It is important to note that Spartanburg County is not a self-contained labor market. Local firms can and do draw employees from across the Upstate South Carolina region. According to the U.S. Census Bureau’s Longitudinal Employer-Household Dynamics, nearly 47 percent of jobs based in Spartanburg County were held by individuals who lived elsewhere. But educational attainment rates are critically important to shaping external perceptions of a community for prospective businesses and investors. Additionally, many employers prefer to hire nearby talent, as factors such as short commutes can help aid employee retention.

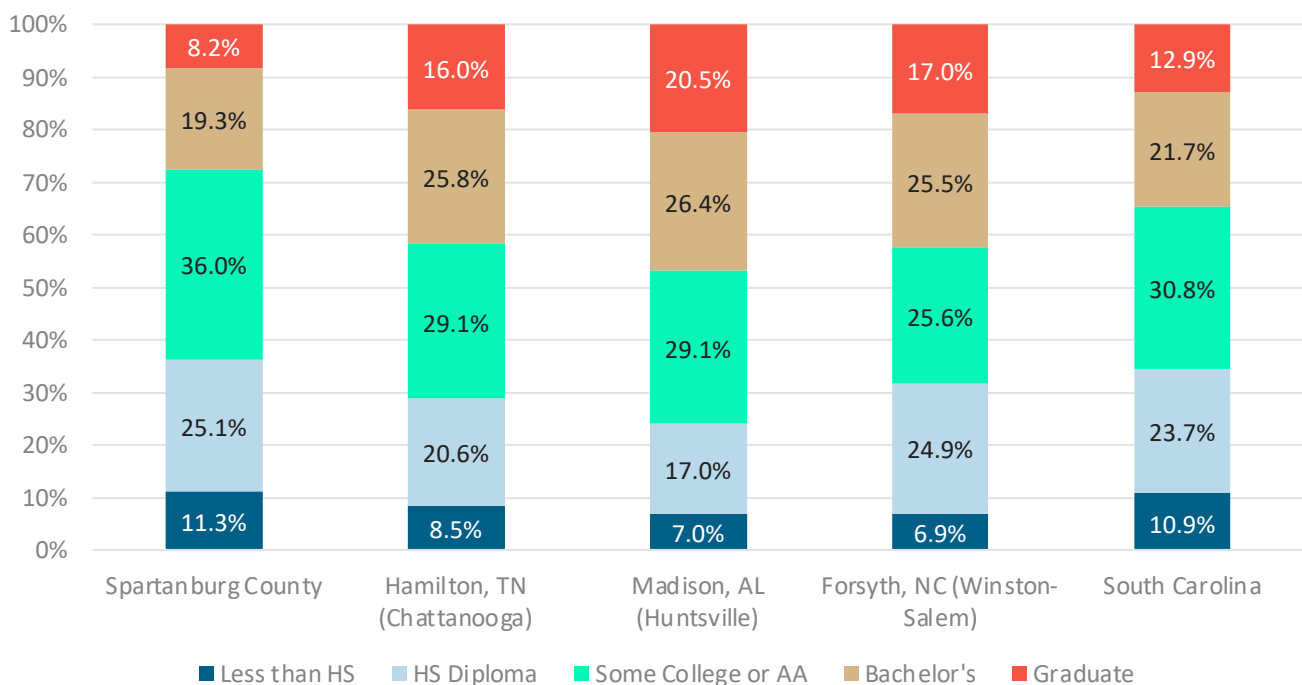
Simply put, educational attainment remains one of the top competitive challenges in Spartanburg County. There are two ways that the community can address this issue. The first is to attract more talented residents to the community. The second is to cultivate and retain a strong homegrown workforce. This Chapter will examine trends and themes related to each of these approaches.

ATTRACTING TALENTED RESIDENTS TO SPARTANBURG COUNTY

Spartanburg County’s population grew rapidly in the preceding decade. Between the 2010 and 2020 Censuses, the community grew by 15.4 percent, more than double the national growth rate of 7.4 percent and second only to Madison, AL (15.9 percent) among comparison communities. **According to the Census Bureau, this growth was driven primarily by people moving to Spartanburg County from somewhere else, a strong positive finding that indicates the community is increasingly a destination for talent.** Domestic in-migration accounted for 77 percent of the community’s growth between 2010 and 2019, and international in-migration was responsible for an additional five percent.

In-migration to Spartanburg County has helped increase the community’s educational attainment levels. On average between 2015 and 2019, 27.6 percent of adults 25 and over who moved to Spartanburg County had obtained at least a bachelor’s degree, 5.0 percentage points above the community’s 2014 baseline. But as shown in Figure 9, in-migrants into comparison communities had even higher levels of four-year degree attainment. **In short, while newcomers are raising educational attainment levels in Spartanburg County, some high-performing communities are pulling further ahead on this metric due to migration trends.**

FIGURE 9: IN-MIGRANT EDUCATIONAL ATTAINMENT FOR AGES 25+, 2015-19



SOURCE: U.S. CENSUS BUREAU AMERICAN COMMUNITY SURVEY 5-YEAR ESTIMATES; BRS

Talent attraction was a priority that emerged during the first Vision Plan process. Stakeholders contacted as part of the Vision Plan 2.0 process praised progress in this area, including the See Yourself in Spartanburg campaign and the talent attraction guide produced by OneSpartanburg, Inc.

When asked to describe a long-term vision for Spartanburg County, many stakeholders said they would like to see the community become a top destination for talent. In the near-term, however, the community will likely be best served by pursuing a targeted approach to talent attraction. One potential area of focus is helping employers identify and attract individuals who can fill certain positions in high demand, such as marketing, digital communications, analytics, information technology, and so on.

Stakeholders said they would like to see the community continue to focus on “boomerang” talent – individuals who have a prior connection to Spartanburg County. Some young professionals contacted through the input process said they believed that while Spartanburg County may not be as competitive with markets such as Atlanta and Charlotte for amenities, it is a place where individuals can make a difference. One stakeholder said, “Many of the things we are enjoying now were created by young professionals 15 years ago and the cool things in 15 years will be created by us now – not many cities that allow you the leeway to do something like that.” **Input participants also noted the important links between talent and destination marketing to prospective visitors.** Stakeholders said the Vision Plan 2.0 should work in concert with a travel and tourism plan currently being developed by OneSpartanburg, Inc. and its partners.

Migration data from the Internal Revenue Service’s Statistics of Income program reveals that Greenville County was by far the largest “source” of in-migrants to Spartanburg County in recent years. Between 2014 and 2019, the IRS tracked a net flow of 7,012 exemptions (used as a proxy for the number of people attached to each tax return) that moved from Greenville County to Spartanburg County, an average of more than 1,400 per year. **This suggests that the community is already an attractive destination for individuals in the Upstate region and that targeted attraction campaigns could generate strong returns.**

FIGURE 10: TOP SOURCES AND DESTINATIONS TO/FROM SPARTANBURG COUNTY, 2014 TO 2019

Top Source Counties	Exemptions	Top Destination Counties	Exemptions
Greenville, SC	7,012	Fulton, GA	-69
Henderson, NC	611	Duval, FL	-54
Cherokee, SC	439	Pinellas, FL	-44
Buncombe, NC	334	Georgetown, SC	-37
Clark, WA	320	Newberry, SC	-31
Sacramento, CA	319	Lexington, SC	-29
Anderson, SC	255	Cobb, GA	-20
Polk, NC	252	Guilford, NC	-19
Broward, FL	247	Forsyth, NC	-14
Union, SC	231		

SOURCE: INTERNAL REVENUE SERVICE; BRS

SPARTANBURG COUNTY’S HOMEGROWN TALENT PIPELINE

Talent attraction will be important for Spartanburg County, particularly in the near-term as the community seeks to rapidly boost its competitiveness for a more diversified economic mix. In both the near- and long-term, however, supporting a strong local talent pipeline and improving educational outcomes will be vital to the community’s success. One community leader contacted through the stakeholder engagement process offered an excellent summary of why this is the case, saying:

“It’s a good thing whenever someone moves here, but it’s better when someone who is on the margins of the community moves into greater prosperity. We get double the benefit. We still have tens of thousands of households (in the community) that don’t seem connected to the region’s economic journey. If we can fix that we would make great progress on our broader goals.”

The most important factor in connecting individuals to economic opportunities is a strong “talent pipeline” – the totality of a community’s education and training systems. This includes everything from early childhood programs and PK-12 schools to higher education and workforce development services.

Stakeholders said Spartanburg County’s colleges and universities are among the strongest aspects of its talent pipeline. As shown in Figure 11, while Spartanburg County has six colleges granting two- or four-year degrees, college enrollment and degree awards were relatively lower than comparison communities on a population-adjusted basis. That said, these institutions unquestionably have a significant positive impact on Spartanburg County’s workforce, culture, and overall vibrancy.

FIGURE 11: HIGHER EDUCATION ENROLLMENT AND DEGREE AWARDS, 2019-20 ACADEMIC YEAR

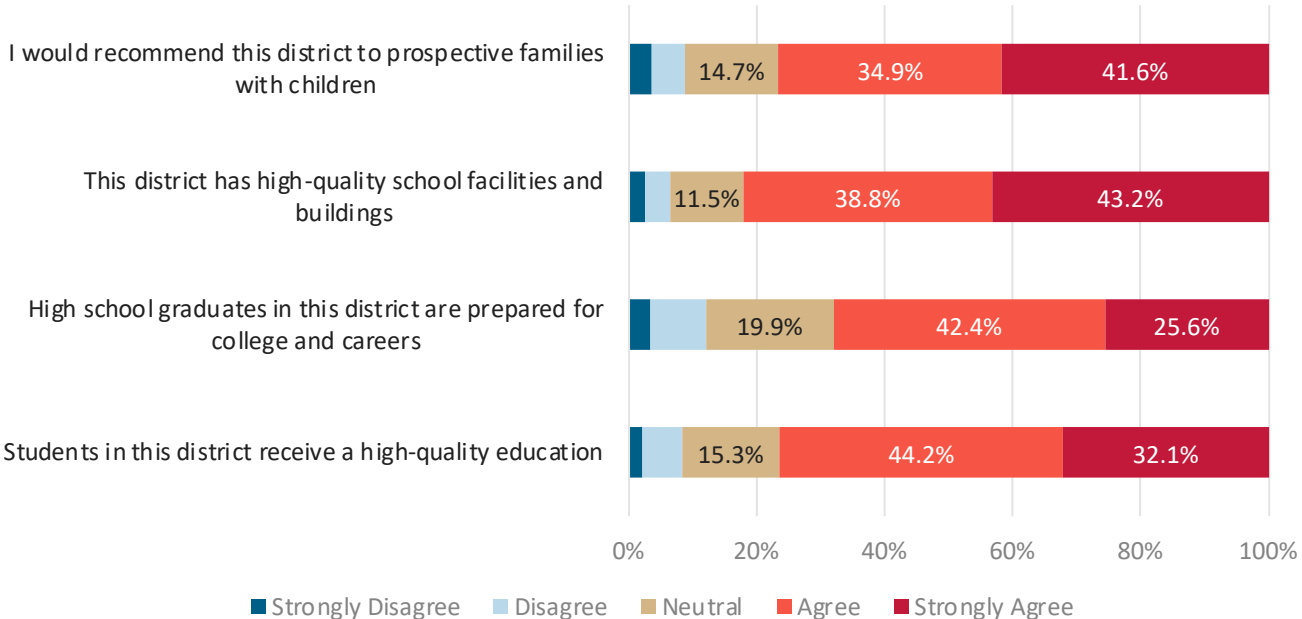
Regions and Schools	Total Enrollment	Enrollment Per 1K Residents	Awards per 1K Residents	AA	BA	Grad.	Total Awards
Spartanburg County	15,686	47.8	9.8	761	1,943	195	3,227
Hamilton, TN (Chattanooga)	23,753	64.9	11.9	789	2,420	521	4,365
Madison, AL (Huntsville)	18,987	48.9	9.0	70	2,353	736	3,492
Forsyth, NC (Winston-Salem)	24,062	62.9	15.9	1,131	2,550	1,368	6,068
South Carolina	245,057	47.9	10.7	---	---	---	---
United States	20,050,421	60.5	13.1	---	---	---	---

SOURCE: NATIONAL CENTER FOR EDUCATION STATISTICS; JOBSEQ; BRS

Note: Due to NCES reporting methodology, data are not available for the Edward Via College of Osteopathic Medicine Spartanburg Campus.

Many input participants expressed positive views about the quality of public PK-12 education in the community. Figure 12 shows online survey responses from individuals who said they were most familiar with one of Spartanburg County’s seven public school districts.¹ It aggregates responses for all seven districts into one chart and excludes answers of “Don’t Know or N/A.” It reveals overwhelmingly positive responses. **For instance, more than three quarters of respondents agreed or strongly agreed with the statement, “I would recommend this district to prospective families with children.”**

FIGURE 12: ONLINE SURVEY QUESTION: “PLEASE RATE THE FOLLOWING STATEMENTS ABOUT THE SCHOOL DISTRICT OR SYSTEM WITH WHICH YOU ARE MOST FAMILIAR.”



SOURCE: ONESPARTANBURG VISION PLAN 2.0 SURVEY; BRS

Data related to student achievement and outcomes, however, reveal a more troubling picture with respect to public PK-12 education in Spartanburg County. Examining the percentage of high schoolers in a cohort who graduate on time is one measure of whether students are making progress toward college and careers. According to the Spartanburg Academic Movement (SAM) data dashboard, the county-wide on-time graduation rate was 88.3 percent in the 2020-21 academic year. According to the South Carolina Department of Education, the statewide graduation rate for 2020-21 was 83.3 percent. But an examination of performance by district shows a more uneven picture. As shown in Figure 13, on-time graduation rates have fallen in three districts between 2015-16 and 2020-21, even as the statewide average rose.

¹ A large majority of responses to this question came from individuals who said they were most familiar with Districts 2, 6, and 7. Fewer than 100 respondents said they were most familiar with each of Districts 1, 3, and 4. Further, responses from each district do not necessarily constitute a representative sample of its enrollment demographics. Overall, however, the trend of highly favorable views held up across all districts and all questions when examining cross-tabulated results.

**FIGURE 13: ON-TIME HIGH SCHOOL GRADUATION RATES BY DISTRICT, 2015-16 TO 2020-21
(GREEN = ABOVE STATE AVERAGE, RED = BELOW STATE AVERAGE)**

District	2016	2021	% pt. chg. 2016 to 2021
Spartanburg District 1	91.1	92.4	1.3
Spartanburg District 2	85.4	92.9	7.5
Spartanburg District 3	82.4	91.9	9.5
Spartanburg District 4	89.4	83.2	-6.2
Spartanburg District 5	85.7	87.3	1.6
Spartanburg District 6	89.7	86.3	-3.4
Spartanburg District 7	85.7	83.6	-2.1
South Carolina Average	82.6	83.3	0.7

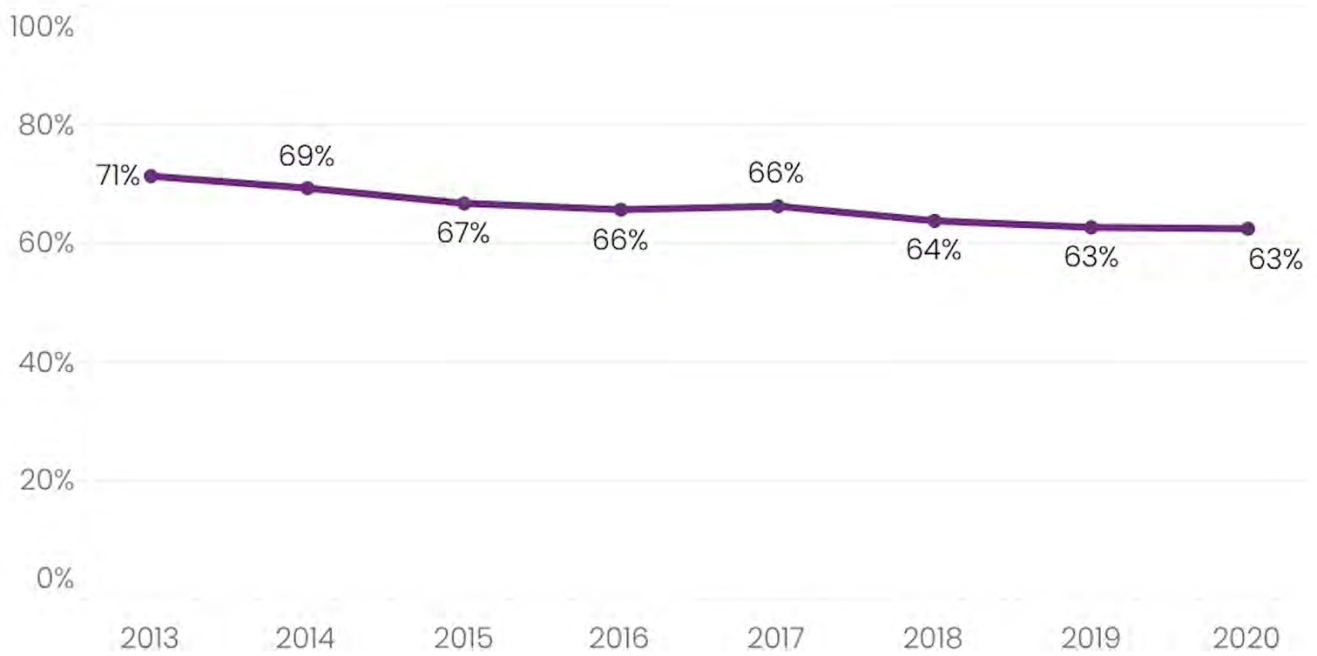
SOURCE: SOUTH CAROLINA DEPARTMENT OF EDUCATION; BRS

SAM’s data dashboard also tracks several other key indicators that track academic attainment at various stages of learning. Among the most relevant to the immediate future of Spartanburg County’s workforce is the percentage of students who are enrolled in college within one year after high school. **It reveals a decline in college enrollment among graduates of Spartanburg County’s public schools.** As shown in Figure 14, the proportion of students enrolling in college within one year of college has steadily declined from roughly 71 percent for the class of 2013 to approximately 63 percent for the class of 2020. While stakeholders in the education field said this decline is consistent with national trends, it is nonetheless concerning for a community urgently seeking to raise its educational attainment rates.

Additional research from SAM focused on the issue of “Summer Melt,” defined as the percent of students reporting an intent to enroll in some form of post-secondary study relative to the percent who actually enroll within one year. **According to SAM, the proportion of students who intended to enroll but did not rose from 8.5 percent in 2013 to 19.4 percent in 2018.**

The factors influencing individual decisions about post-secondary enrollment are complex; better economic conditions often lead to declining post-secondary enrollments as well-paying jobs with lower barriers to entry become more plentiful. **But the multi-year trends in post-secondary enrollment raise serious concerns as to whether Spartanburg County will be able to produce the kind of homegrown talent necessary to support a more robust economy that can raise levels of prosperity in the community.**

FIGURE 14: STUDENTS ENROLLED IN COLLEGE WITHIN ONE YEAR OF HIGH SCHOOL, 2013-2020



SOURCE: SPARTANBURG ACADEMIC MOVEMENT

Many Vision Plan 2.0 input participants recognized these challenges. They described a “difficult conversation” around the gap between local perceptions of the community’s PK-12 schools and outcomes evident in data. Some individuals also noted that comparing schools to South Carolina averages may be setting expectations too low, as the state ranks in the bottom quintile on state rankings for various measures of academic achievement.

Overall, many stakeholders said the community must take bold action to improve educational outcomes.

Commonly cited areas for improvement included kindergarten readiness and “wraparound” services for young children and their families, closing race/ethnicity achievement gaps in PK-12 schools, and seeking better “onramps” for high school graduates to enter college and high-quality careers.

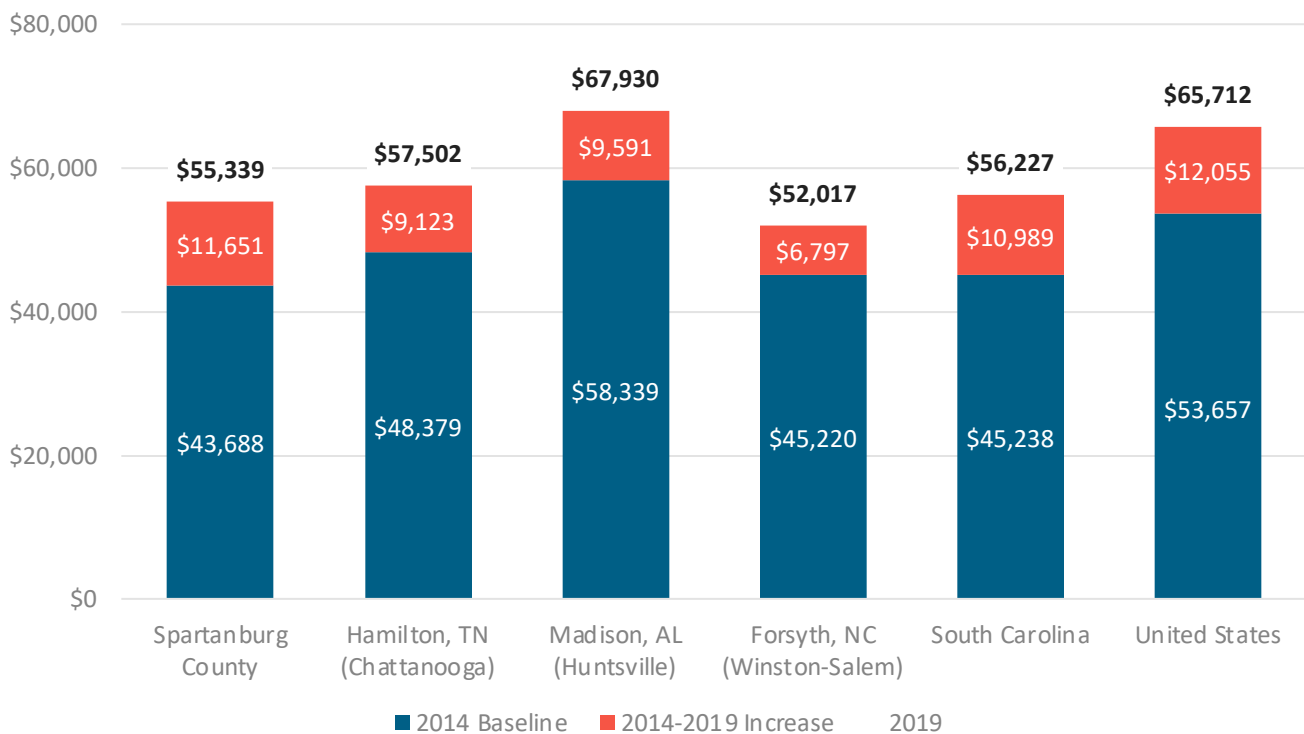
Stakeholders said there are efforts underway to address some of these issues, ranging from free tuition for the 2021-22 academic year at Spartanburg Community College to the Hello Family Initiative focusing on a continuum of services for children born in the City of Spartanburg from prenatal care through age five. Additionally, between federal funding from the American Rescue Plan Act of 2021 (ARP) and significant philanthropic investment into SAM from Blue Meridian Partners, the resources to address education and training issues in Spartanburg County are virtually unprecedented. **Stakeholders said the community must seize this rare opportunity to strengthen Spartanburg County’s talent pipeline and improve educational outcomes.**

CHAPTER 3. ENSURING BROADLY SHARED PROSPERITY

The ultimate goal at the heart of a community and economic development effort is to raise standards of living and improve quality of life for current and future residents. While quality of life is a more subjective concept, standards of living can be captured by looking at various measures of economic well-being, such as personal and household incomes, poverty rates, and so on.

The median household income in Spartanburg County increased by \$11,651 between 2014 and 2019, a 26.7 percent increase that led all comparison geographies. (Overall, the national median income rose by a larger dollar amount because it began from a much higher baseline.)

FIGURE 15: CHANGE IN MEDIAN HOUSEHOLD INCOME. 2014 TO 2019



SOURCE: U.S. CENSUS BUREAU AMERICAN COMMUNITY SURVEY 1-YEAR ESTIMATES; BRS

During the same 2014 to 2019 window, per capita income in Spartanburg County increased by roughly \$6,000. This works out to a gain of 15.7 percent, a slower growth rate relative to state and national averages and ahead of only Forsyth, NC (Winston-Salem) among comparison communities. That said, growth in per capita income far outpaced inflation as measured by the Consumer Price Index (CPI) for mid-sized Southern cities during the same time. In other words, **the purchasing power of individuals increased and standards of living rose in Spartanburg County during the most recent five-year period for which data is available.**

Among the most positive trends observed in Spartanburg County in recent years are the sharp declines in both overall and child poverty rates. As shown in Figure 16, poverty was down across all comparison geographies between 2014 and 2019, but Spartanburg County posted the largest decline in both metrics. The 8.5 percent decline in child poverty was a full 2.0 percentage points better than any other comparison.

FIGURE 16: CHANGE IN OVERALL AND CHILD POVERTY RATES. 2014 TO 2019

Geography	Poverty Rate, All Ages			Poverty Rate, Ages 0-17		
	2014	2019	% pt. chg. 2014-19	2014	2019	% pt. chg. 2014-19
Spartanburg County	17.7%	12.9%	-4.8%	26.7%	18.2%	-8.5%
Hamilton, TN (Chattanooga)	15.9%	12.7%	-3.2%	22.0%	18.8%	-3.2%
Madison, AL (Huntsville)	14.2%	11.5%	-2.7%	20.3%	16.8%	-3.5%
Forsyth, NC (Winston-Salem)	19.7%	15.2%	-4.5%	27.6%	22.5%	-5.1%
South Carolina	17.9%	13.9%	-4.0%	26.4%	19.9%	-6.5%
United States	15.5%	12.3%	-3.2%	21.7%	16.8%	-4.9%

SOURCE: U.S. CENSUS BUREAU SMALL AREA INCOME AND POVERTY ESTIMATES (SAIPE); BRS

While the preceding figures tell a positive story overall, a recurring theme from the stakeholder engagement process is these “topline” figures are not capturing the full reality of prosperity and well-being in the community. **According to stakeholders, many individuals and families are struggling financially and are “disconnected” from the county’s success.** This Chapter will explore trends related to this theme.

While official poverty rates have fallen sharply, many experts have long contended that the federal poverty standard is a rough metric that fails to account for the true cost of self-sufficiency. The United Way Association of South Carolina developed a separate standard, “The Self-Sufficiency Standard for South Carolina 2020,” to address this issue. It estimates that a household consisting of one adult, one preschooler, and one school-aged child would require \$45,275 in annual income to be self-sufficient. While it is not possible to directly estimate the proportion of households that are not self-sufficient, nearly 31 percent of households in Spartanburg County have an annual income of less than \$35,000 per year.

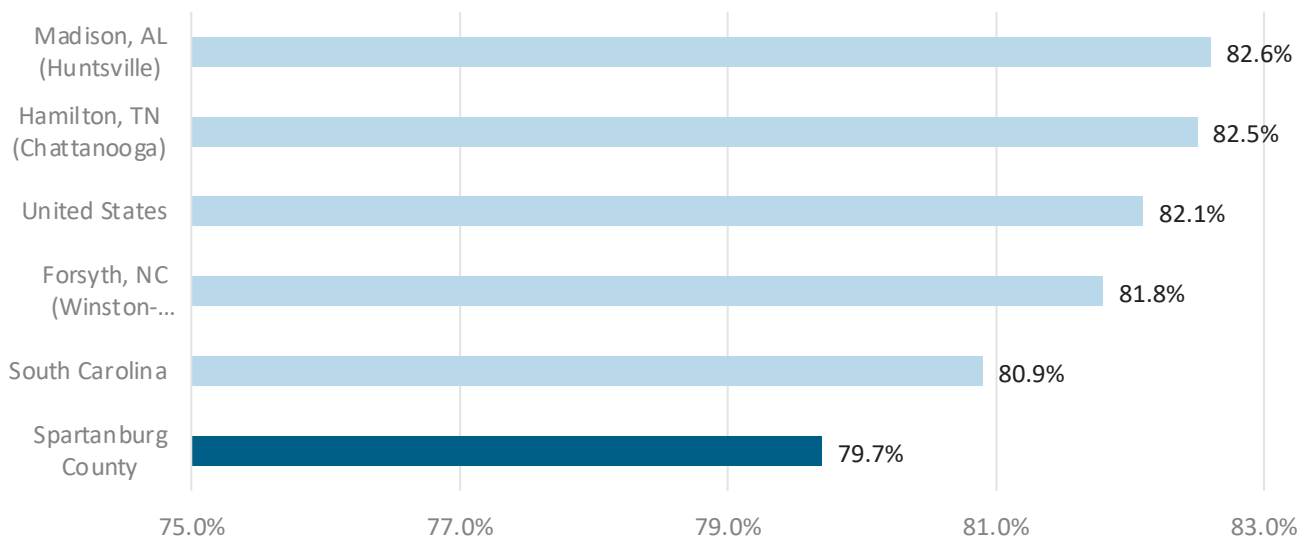
Input participants also said there has been a notable increase in the number of individuals experiencing homelessness in Spartanburg County. In its 2020 Point in Time Count, the Upstate Continuum of Care identified 201 individuals who were experiencing homelessness, including 35 who were unsheltered. These counts are slightly below 2019 levels. Data from 2021 that may more accurately reflect post-pandemic conditions are not yet available, however, and some stakeholders said that the Point in Time Count may understate the true challenge because it does not include individuals who lack stable housing but have found temporary arrangements (e.g. staying on a friend’s couch).

LABOR FORCE PARTICIPATION AND BARRIERS TO EMPLOYMENT

As previously discussed, stakeholders said that many Spartanburg County residents are disconnected from the local economy. Spartanburg County’s official unemployment rate is quite low. As of June 2021, the most recent month for which data are available, the community’s unemployment rate was 4.5 percent, well below the national average of 6.1 percent. But unemployment rates include only those individuals in a community who are employed or actively looking for work. Individuals who are unemployed but not actively looking for work for any reason are considered to be out of the labor force.

A community’s prime-age labor force participation rate (LFPR) provides further insights into the proportion of a community’s residents aged 25 to 54 who are engaged in the labor force. According to JobsEq, **Spartanburg County’s prime-age LFPR in 2019 was 79.7 percent, lowest among all comparison geographies and 2.4 percentage points less than the national rate.**² An examination of historical trends shows that Spartanburg County’s prime-age LFPR tracked below all comparison geographies in every year between 2010 and 2019. While a 2.4 percentage point gap may seem relatively small, Spartanburg County there would have been nearly 3,000 additional prime-age workers in Spartanburg County’s labor force in 2019 had the community’s prime-age LFPR been consistent with the national average.

FIGURE 17: PRIME-AGE LABOR FORCE PARTICIPATION RATE (AGES 25 TO 54), 2019



SOURCE: JOBSEQ; BRS

While labor force participation is a complex topic, **stakeholders frequently cited two barriers that keep many Spartanburg County residents out of the labor force: childcare and transportation.**

² Due to data availability issues, it is difficult to calculate a “real-time” prime-age LFPR. That said, it is useful to look at 2019 prime-age LFPR to remove any transitory pandemic-related impacts on this metric.

Input participants said that while affordability of childcare is an issue for many, there are simply not enough high-quality childcare options to keep up with demand. This is consistent with industry and occupation data. According to JobsEQ, the “Child Day Care Services” industry sector was approximately 25 percent less concentrated in Spartanburg County relative to the national average in 2021. A simple analysis of occupation data also reveals that Spartanburg County has fewer childcare workers and preschool teachers relative to its population of young children. Figure 17 shows that for every 1,000 children younger than 10 years old, there were roughly 15.7 childcare workers in Spartanburg County, the lowest ratio among comparison geographies. A similar trend was observed for preschool teachers relative to children younger than five. A more in-depth analysis of childcare dynamics in Spartanburg County is beyond the scope of this analysis, **but these figures suggest childcare options may be undersupplied in Spartanburg County.**

FIGURE 18: CHILDCARE WORKERS AND PRE-SCHOOL TEACHERS RELATIVE TO THE YOUTH POPULATION, Q1 2021 (GREEN = ABOVE NATIONAL AVERAGE, RED = BELOW NATIONAL AVERAGE)

	Child care workers per 1K children under 10	Preschool teachers per 1K children under 5
Spartanburg County	15.7	18.2
Hamilton, TN (Chattanooga)	28.1	27.3
Madison, AL (Huntsville)	20.9	22.9
Forsyth, NC (Winston-Salem)	25.1	28.5
South Carolina	17.9	19.2
United States	21.4	21.7

SOURCE: JOBSAQ; U.S. CENSUS BUREAU AMERICAN COMMUNITY SURVEY 1-YEAR ESTIMATES; BRS
 Note: Preschool teachers exclude special education teachers; population figures are ACS 1-year estimates for 2019.

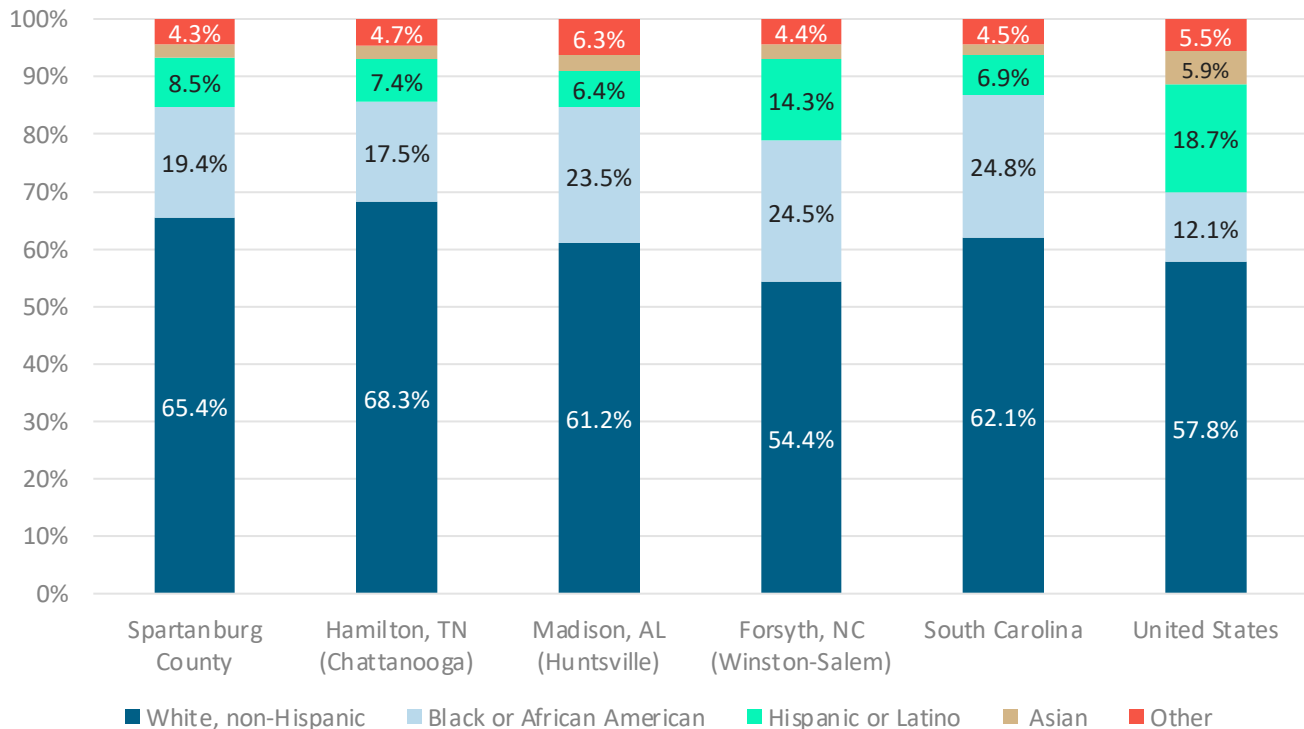
According to five-year estimates from the American Community Survey covering 2015 to 2019, 94.5 percent of workers aged 16 and over in Spartanburg County commuted to work in a car, truck, or van; nearly 85 percent drove alone. Fewer than two percent of workers walked, bicycled, or utilized public transportation to get to work. But according to ACS estimates covering 2015 to 2019, **more than 6,700 households in Spartanburg County did not have access to a vehicle.**

Stakeholders said they would like to see transportation options expanded within Spartanburg County. Given the community’s land use patterns, a comprehensive solution for public transit would likely prove elusive, but stakeholders expressed optimism about a vanpool/carpool pilot program expected to launch in fall 2021. Input participants also noted an opportunity to co-locate both jobs and residential density in Downtown Spartanburg in order to allow individuals in the area and surrounding neighborhoods to commute to work via walking or biking.

RACE, ETHNICITY, AND EQUITY

Another major theme to emerge from the stakeholder engagement process is that when it comes to levels of prosperity in Spartanburg County, inequity that breaks down along racial and ethnic lines must not be ignored. Said one input participant, “In every single circle there are conversations about equity.” Another said, “You can’t talk about education, health outcomes, and so on without talking about race and ethnicity.”

FIGURE 19: RACIAL AND ETHNIC COMPOSITION, 2020



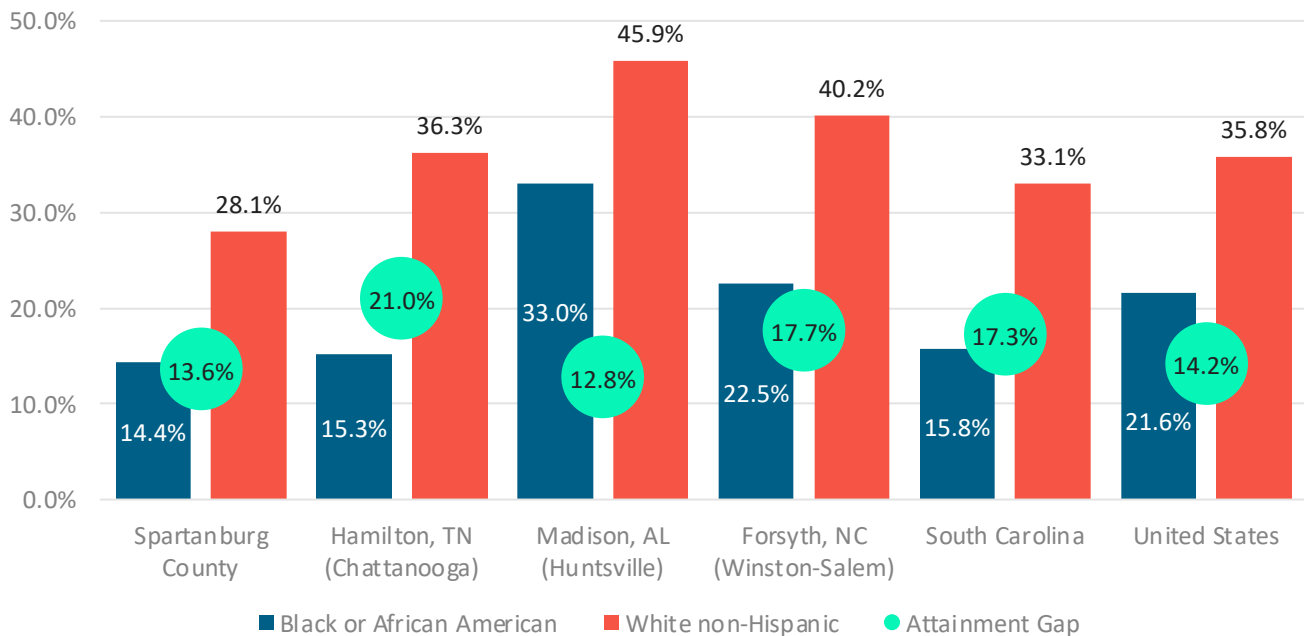
SOURCE: U.S. CENSUS BUREAU 2020 CENSUS; BRS

As shown in Figure 19, Spartanburg County’s minority groups accounted for more than a third of the community’s total population as of the 2020 Census. **Evidence suggests that many minorities in Spartanburg County are generally faring worse than the community’s White, non-Hispanic residents.** Input participants frequently cited the Spartanburg Racial Equity Index – a 2018 report prepared by the USC Upstate Metropolitan Studies Institute on behalf of the Spartanburg Community Indicators Project – as a highly influential document in bringing these issues to the forefront in Spartanburg County. The Racial Equity Index examined a wide variety of data indicators related to topics such as employment and income, housing, and health outcomes – all of which had been disaggregated by race and ethnicity. These indicators revealed significant inequities by race and ethnicity, with the community’s White, non-Hispanic residents consistently faring better than Black or African American and Hispanic or Latino residents.

Examining more recent data for selected indicators suggest that these inequities persist. For instance, the American Community Survey provides estimates for per capita income by race and ethnicity.³ The ACS estimates that on average between 2015 and 2019, **the per capita income for Black or African American residents were just 65 percent of the per capita for White non-Hispanic residents. For Hispanic or Latino residents, this figure was 56 percent.** While these gaps were even worse at the national level during the comparable period (58 percent and 51 percent, respectively), these figures nevertheless illustrate a stark racial inequity.

Looking at educational attainment, the ACS estimates that 28.8 percent of Spartanburg County’s White, non-Hispanic residents had obtained a bachelor’s degree or higher on average between 2015 and 2019. The estimates for Black residents during the same period was 14.4 percent.

FIGURE 20: BACHELOR’S DEGREE ATTAINMENT BY RACE AND ETHNICITY 2015 TO 2019



SOURCE: U.S. CENSUS BUREAU AMERICAN COMMUNITY SURVEY 5-YEAR ESTIMATES; BRS

Racial equity is a complex issue with deep roots. **But many stakeholders articulated a clear business case for focusing on closing equity gaps, particularly when it comes to education and homegrown talent. Many businesses, especially those in knowledge-based and corporate sectors, increasingly place a premium on diverse talent that can help organizations stary competitive and serve an increasingly diverse nation.** Educational attainment is also strongly correlated with a wide range of positive outcomes for both individuals and communities. If Spartanburg County is to maximize its chances for success, it must seek to improve outcomes for all its residents.

³ The ACS uses a different methodology and should not be compared to the PCI figures elsewhere in this report.

CHAPTER 4: ENHANCING QUALITY OF PLACE

Quality of place is an increasingly important consideration in community and economic development. **Businesses and individuals alike value communities that are aesthetically pleasing, offer entertainment options and places to socialize, have abundant green and open spaces, and so on.** Additionally, many knowledge-based and corporate firms place a premium on walkable and amenity-rich built environments that appeal to highly skilled and educated workers.

During the first OneSpartanburg Vision Plan process, one of the biggest themes overall was the desire of residents to see a more dynamic Downtown Spartanburg. In the intervening years, many of the most visible changes in the community have occurred in Downtown Spartanburg. Stakeholders cited new restaurants and shops, hotel and residential developments, aesthetic improvements, and the ongoing pedestrianization of Morgan Square as positive changes that have occurred in recent years.

The overall sentiment among stakeholders was that continued growth and improvement in Downtown Spartanburg will be critical to the economic fortunes of the entire county going forward. That said, input participants also said they desired quality of place improvements elsewhere in Spartanburg County, particularly when it comes to leveraging and enhancing the community’s assets for outdoor recreation. This section will explore stakeholder input related to quality of place throughout the community.



DOWNTOWN LANDRUM, SC; PHOTO BY KAVIN BRADNER FOR ONESPARTANBURG, INC.

BUILDING ON MOMENTUM IN DOWNTOWN SPARTANBURG

When asked to describe the most notable changes in Spartanburg County in recent years, input participants frequently highlighted new development, investment, and progress in Downtown Spartanburg. Data from SeeSpartanburgRise.com, a website managed by the City of Spartanburg, illustrates this progress. According to the website, there have been 18 commercial, residential, mixed-use, nonprofit, or public sector developments in the Downtown Spartanburg area between 2017 and 2021, totaling nearly \$75 million investment into the district. An additional 12 projects representing a projected capital investment of roughly \$249 million are in the planning or development pipeline.

Stakeholders noted that individuals throughout Spartanburg County view Downtown Spartanburg as a vital economic development asset. Said one individual, “Spartanburg County understands the value of the City of Spartanburg and the central business district to their story.” Another stakeholder said, “This town has come so far and so many people have contributed to downtown and the county as a whole to make it a great place to be. I probably wouldn’t have put my business in Spartanburg if that hadn’t happened.”

Input participants said that the community has an opportunity to build on this momentum to help further transform the downtown district into a destination of choice for both jobs and talent. Figure 21 is a word cloud synthesizing online survey responses to an open-ended question: “What additions or improvements would you like to see in Downtown Spartanburg?” Parking clearly stands out as a key issue for stakeholders in addition to expanded opportunities for dining, shopping, and entertainment.

FIGURE 21: WORD CLOUD OF ONLINE SURVEY RESPONSES: “WHAT ADDITIONS OR IMPROVEMENTS WOULD YOU LIKE TO SEE IN DOWNTOWN SPARTANBURG?”



SOURCE: ONESPARTANBURG VISION PLAN 2.0 SURVEY; BRS

Some stakeholders contacted through interviews and focus groups, however, offered a different perspective on parking in Downtown Spartanburg. These individuals said that the district has sufficient parking to meet overall demand, noting that perceptions about a shortage of parking may be due to a difficulty in finding spaces directly in front of a specific business. According to the City of Spartanburg, there are more than 2,700 parking spaces in four downtown parking garages that are available for free on nights and weekends.

As the community’s central business district, downtown Spartanburg also has significant potential to address some of the community’s biggest shortcomings with respect to quality of place. Online survey respondents were asked to rate multiple aspects of quality of life and quality of place in Spartanburg County on a scale of 1 to 10, with 1 being “very weak” and 10 being “very strong.” The weighted averages of these responses are shown in Figure 22 on the following page.

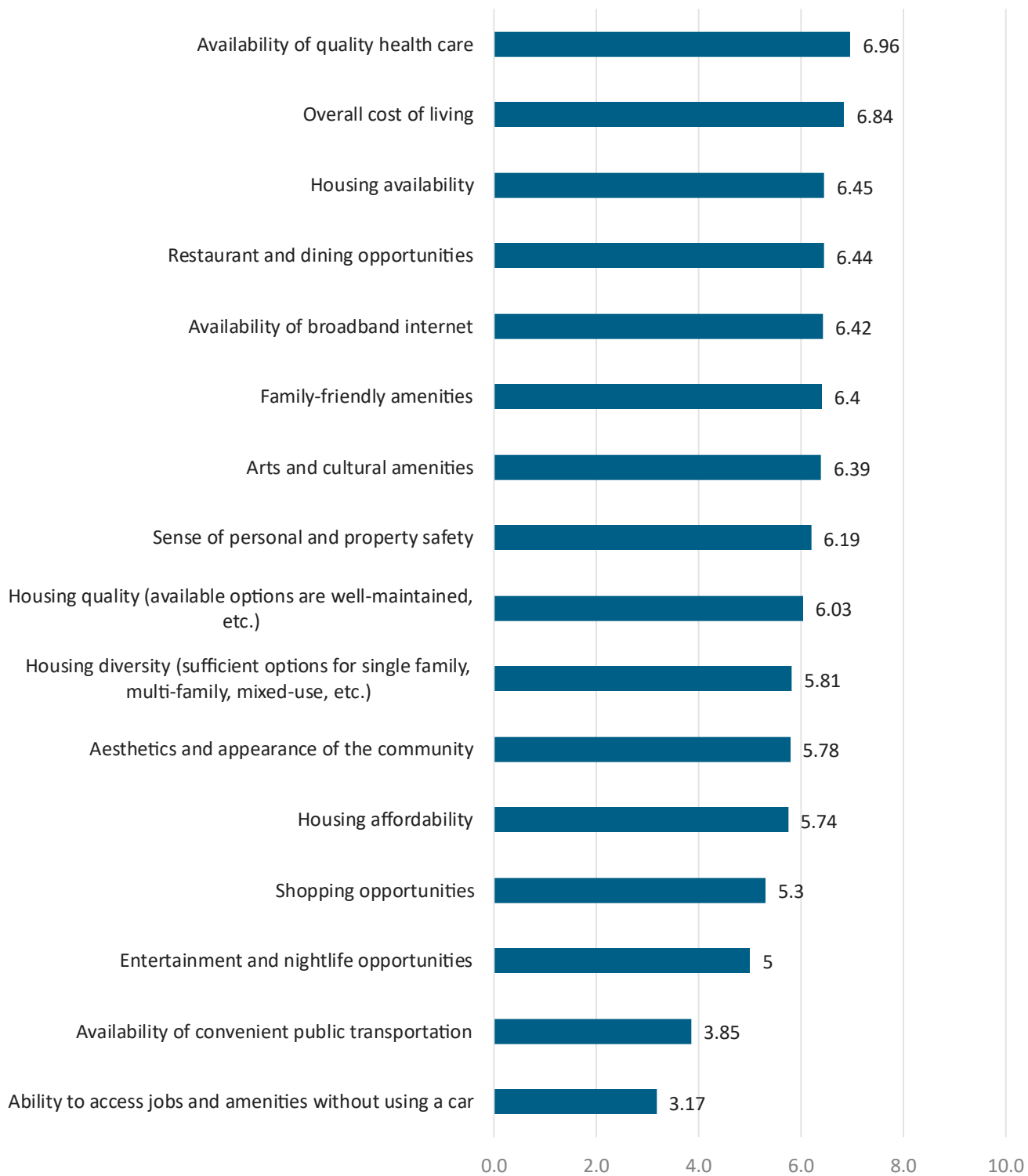
By far the lowest-ranked aspect is “Ability to access jobs and amenities without using a car.” Given the relatively auto-oriented and/or rural character of many parts of the community, this is not necessarily a surprising result. Spartanburg County’s downtowns are an exception to this dynamic, while **Downtown Spartanburg in particular stands apart as a walkable area with special capacity to accommodate commercial, residential, and mixed-use density that may not be viable and/or desirable in other areas.**

Stakeholders said they desired to see more knowledge-based and corporate employment in Downtown Spartanburg. To accommodate these jobs, however, more Class A office space will be required. According to stakeholders, there are virtually no significant blocks of Class A office space available in the district as of the time of this report. Input participants with knowledge of real estate market conditions said doing so will require strategies to navigate high property tax rates; stakeholders familiar with market conditions said effective rates are far above the downtowns of Atlanta, Charlotte, Columbia, and Greenville.

Adding Class A office space would be an opportunity to capitalize on anticipated trends. According to a September 2021 analysis from Cushman & Wakefield, “In the post-COVID-19 era, the quality of office space will become more important than ever.” It added, “Companies that offer high-quality, well-located, amenities office spaces that excite workers and encourage in-office attendance will have a competitive advantage.”

Input participants also said Downtown Spartanburg can accommodate additional housing product – including multifamily, condominiums, and townhomes – that could substantially increase the residential population of the district. Combined with the population of surrounding neighborhoods, this additional density could create a “critical mass” of households needed to support a wider variety of dining, retail, and entertainment options. **Simply put, by increasing both the daytime population (in the form of more Class A office space and jobs) and the residential population (through the development of new housing units), Downtown Spartanburg could become the type of live-work-play environment that few mid-sized communities could match.**

FIGURE 22: ONLINE SURVEY RESPONSES: “PLEASE RANK THE FOLLOWING FEATURES OF SPARTANBURG COUNTY’S QUALITY OF LIFE, WITH 1 = VERY WEAK AND 10 = VERY STRONG”



SOURCE: ONESPARTANBURG VISION PLAN 2.0 SURVEY; BRS

Many input participants said they believe Downtown Spartanburg would also benefit from a **transformative or catalytic amenity of some kind**, with ideas ranging from creating a water feature to a large meeting space to professional sports. **One immediate catalytic opportunity that came up frequently during the stakeholder engagement process is the redevelopment of Morgan Square.** A key component of the first Vision Plan, progress toward redeveloping Morgan Square accelerated during the pandemic when the area was pedestrianized to help restaurants in the area stay afloat with outdoor dining.

While not a unanimous viewpoint, the pedestrianization effort was popular and in August the Spartanburg City Council voted to keep West Main Street closed to vehicular traffic for another year. Input participants said the focus now shifts to developing a plan to overhaul the area and replace the temporary traffic calming devices and street furniture installed during the pandemic with a coherent and inviting public space. A frequent refrain among stakeholders was, **“We have to get Morgan Square right.”**

Two additional themes emerged from the stakeholder input process with respect to Downtown Spartanburg. First, while Morgan Square is undoubtedly a focal point, stakeholders said that the community should think of Downtown Spartanburg as a much larger area that is connected to the neighborhoods around it. Said one input participant, **“Pedestrian issues are about more than one block in Morgan Square.”** As an example, several input participants noted that busy Church Street functions as something of a barrier separating the east and west sides of the downtown area. Second, many stakeholders said not all Spartanburg County residents feel welcome in Downtown Spartanburg. **Input participants said they would like to see more minority-owned businesses downtown in addition to programming and events designed to appeal to a broad range of residents.**



WEST MAIN STREET NEAR MORGAN SQUARE; PHOTO BY KAVIN BRADNER FOR ONESPARTANBURG, INC.

IMPROVING QUALITY OF PLACE THROUGHOUT THE COMMUNITY

While Downtown Spartanburg is a clear asset for the community, stakeholders also recognize the importance of improving quality of place throughout Spartanburg County to make the community a more competitive location for talent and to improve quality of life for residents. Input participants contacted through interviews, focus groups, and the online survey suggested a wide variety of potential quality of place improvements for the community to pursue. This section synthesizes some of the main themes that emerged through this input, presented in no particular order:

Gateways and corridors. Gateways are the key transportation corridors that serve as a community’s “front door” and have an outsized influence on the first impressions of visitors and prospective investors and residents. Stakeholders said the community has made strong progress on its gateways as part of the implementation of the first Vision Plan, but that more work is still needed, particularly along Asheville Highway and U.S. Highway 29. Some stakeholders said in addition to landscaping, signage, etc. on the public right of way, the community must also take steps to encourage private property owners to invest in properties that appear blighted and/or run down.

Redevelopment of vacant and underutilized properties. Stakeholders said there are several major opportunities for redevelopment in the community, with Westgate Mall near the top of the list. Input participants said that Spartanburg County has made tremendous progress advancing conversations around zoning in recent years, which could help guide redevelopment efforts at individual sites and along the corridors referenced in the preceding paragraph.

Retail development. Input participants said they would like to see shopping opportunities expanded in Spartanburg County. Some stakeholders said they believed the community will likely be more competitive for a wider mix of retail options given Spartanburg County’s growth. Said one input participant with knowledge of local market conditions, “It’s time for regional and national retail in Spartanburg, but it will require long-term work (to make that happen).” Stakeholders said opportunities for attracting a broader range of retail could exist both in Downtown Spartanburg and elsewhere in the community.

Supporting secondary downtowns and neighborhood centers. Stakeholders reported positive momentum in several other downtowns and neighborhood hubs around Spartanburg County in recent years, including Cowpens, Greer, and Woodruff among others. Input participants said they would like to see more restaurants, shops, and locally owned businesses in these areas along with improvements to the public realm (e.g. streetscapes, public art, etc.).

Neighborhood development. Input participants noted that many areas of the City of Spartanburg have suffered from disinvestment and that conditions have not substantially improved in recent years despite overall economic growth. Stakeholders expressed a desire to see support for small business development and place-based improvements in neighborhoods within the City of Spartanburg but outside of downtown.

Expanding and connecting trails. During the input process, stakeholders said they were especially proud of The Daniel Morgan Trail System or simply “The Dan.” Partners for Active Living (PAL) is working with community partners to develop the urban trail system which could grow to 50 miles upon completion. Stakeholders said that while substantial progress has been made on The Dan in recent years, they would like to see work accelerated to build out and connect the system to other community assets such as parks and neighborhood centers. Stakeholders also noted opportunities for small business development along the trail, particularly adjacent to the Union Street corridor.

Leveraging and enhancing outdoor amenities. Input participants said that Spartanburg County has a strong value proposition for individuals who value outdoor recreation, both in terms of its proximity to other top destinations and assets within the community. Said one input participant, “There is an opportunity for Spartanburg to identify itself as an outdoor, active living community. We have tons of natural assets in the county and a lot of momentum if we can leverage those things.” Stakeholders said they would like to see the community enhance promotional efforts and improve access to outdoor amenities, such as attracting an outfitter operation to better leverage “blueways” or recreational waterways.



GLENDALE BRIDGE OVER LAWSON'S FORK CREEK; PHOTO BY KAVIN BRADNER FOR ONESPARTANBURG, INC.

CHAPTER 5: KEEPING PACE WITH GROWTH

As previously discussed, Spartanburg County has experienced strong population growth in recent years. Figure 23 shows decennial Census counts from 2000, 2010, and 2020. It reveals that Spartanburg County had the second-highest population growth rate among all comparison communities between 2010 and 2020. Overall, the community has added more than 74,000 net new residents since 2000.

FIGURE 23: POPULATION CHANGE, 2000 TO 2020

Geography	Total Population			Growth Rate	
	2000	2010	2020	2000 to 2010	2010 to 2020
Spartanburg County	253,957	284,307	327,997	12.0%	15.4%
Hamilton, TN (Chattanooga)	308,115	336,463	366,207	9.2%	8.8%
Madison, AL (Huntsville)	276,998	334,811	388,153	20.9%	15.9%
Forsyth, NC (Winston-Salem)	306,274	350,670	382,590	14.5%	9.1%
South Carolina	4,012,023	4,625,364	5,118,425	15.3%	10.7%
United States	281,421,906	308,745,538	331,449,281	9.7%	7.4%

SOURCE: U.S. CENSUS BUREAU 2020 CENSUS; BRS

This growth has surpassed previous expectations. Spartanburg County’s 2019 Comprehensive Plan document includes a table of population projections for Spartanburg County developed in the early 2010s. According to these projections, Spartanburg County was expected to have 331,200 residents by 2030. But as shown in the preceding table, the community had already pulled within roughly 3,200 residents of that mark as of the 2020 Census.

Some stakeholders said that the community must now take a more proactive approach to planning for future growth. Said one input participant, “Spartanburg had the capacity to absorb almost any kind of growth in 2016, but with as much growth as we’ve had in the past five years, we better plan (ahead) and think about what sort of growth there ought to be.”

Input participants expressed concerns about the ability of existing infrastructure systems – e.g. roads and sewers – to keep up with demand without additional investment. This is evident in the word cloud shown in Figure 24 on the following page. It reveals that roads emerged as a primary quality of life concern for areas outside of Downtown Spartanburg.

FIGURE 25: CHANGE IN COMMUTE TIMES. 2014 TO 2019

Geography	Mean Commute Time in Minutes			% of Commuters with at least a 30-minute trip to work		
	2014	2019	% chg.	2014	2019	% pt. chg.
Spartanburg County	23.0	23.9	3.9%	28.2%	30.4%	2.2%
Hamilton, TN (Chattanooga)	21.1	22.2	5.2%	24.1%	27.6%	3.5%
Madison, AL (Huntsville)	20.9	21.3	1.9%	23.8%	27.3%	3.5%
Forsyth, NC (Winston-Salem)	21.7	23.9	10.1%	23.9%	27.6%	3.7%
South Carolina	24.1	26.0	7.9%	32.7%	36.8%	4.1%
United States	26.0	27.6	6.2%	36.9%	39.6%	2.7%

SOURCE: U.S. CENSUS BUREAU AMERICAN COMMUNITY SURVEY 1-YEAR ESTIMATES; BRS

To gain a sense for the type of growth Spartanburg County can expect in the coming years and how the community can prepare, OneSpartanburg, Inc. and its partners have commissioned a Growth Potential Study that is running concurrent with the Vision Plan 2.0 process. The Broad Ripple Strategies team will work with OneSpartanburg, Inc. and its partners to ensure that this study and Vision Plan 2.0 are complementary documents that position the community for future success.

A NEED FOR A VARIETY OF NEW HOUSING OPTIONS

A key theme from input that frequently came up in the context of the community's growth was housing. **Stakeholders said that Spartanburg County needs a wide variety of new housing products.** This includes everything from affordable and workforce units to multifamily product that appeals to young professionals to the executive housing necessary for growth in the knowledge-based and corporate job sectors.

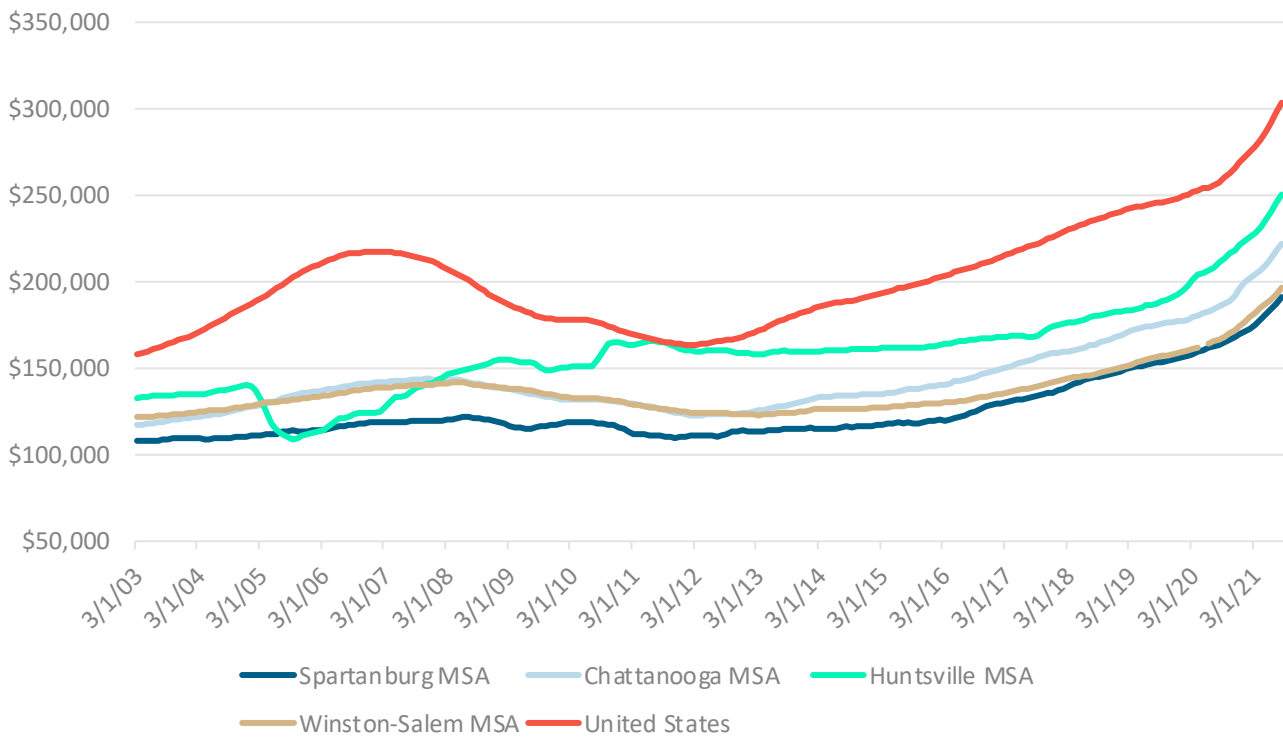
A detailed analysis of housing market conditions is beyond the scope of this Assessment. But some high-level indicators can provide insight into housing affordability trends and whether the community has been adding new housing units at a rate to match its population growth.

Utilizing Census estimates to assess housing affordability has some limitations, namely delays in reporting. For instance, the most recent American Community Survey estimates are from 2019 and therefore do not capture the dramatic shifts in the housing market that have occurred during the pandemic. That said, Census estimates show that on average between 2015 and 2019, Spartanburg County had relatively affordable home prices compared to the community's median income and a relatively low percentage of renters paying at least 30 percent of their income on rent compared to the national average.

More recent proprietary data from Zillow, however, shows a substantial increase in for-sale housing costs in Spartanburg County. Figure 26 shows the Zillow Home Value Index from March 2003 (the first month for which data were available for Spartanburg County) to August 2021. The index shows the typical value for all housing types (e.g. single family, condo. etc.) in the 35th to 65th percentile range for a given geography. It is seasonally adjusted and smoothed to make the data more legible.

As the figure shows, housing prices were relatively flat in Spartanburg for many years before beginning a noticeable upward trajectory in 2016 and accelerating further during the pandemic. **Between August 2016 and August 2021, the typical value for a Spartanburg County home rose by nearly \$67,000, an increase of 54 percent.** Similar increases were observed nationally and in other comparison markets. But the Zillow data nevertheless helps shed light on why many stakeholders in Spartanburg County expressed concerns about housing affordability during the input process.

FIGURE 26: ZILLOW HOME VALUE INDEX, MARCH 2003 TO JULY 2021



SOURCE: ZILLOW; BRS

Looking at Census data covering changes in the population and number of housing units also suggests that the supply of housing in Spartanburg County may not be keeping pace with population growth.

Spartanburg County added approximately one net new housing unit for every three net new residents between 2010 and 2020.⁴ The average household size in Spartanburg County, however, was 2.54 in 2020. Put another way, the number of households in Spartanburg County increased by 15.2 percent between 2010 and 2020 while the total number of housing units grew by just 11.2 percent.

The preceding should not be seen as a definitive look at Spartanburg County’s housing market dynamics, but the **data suggest that home prices in the community have increased sharply in recent years and that the pace of population growth outpaced the net increase in housing units. Input participants with direct knowledge of real estate conditions said they would like to see the community pursue strategies to promote and incentivize the development of a wide range of new housing products in the coming years.**

⁴ This population county excludes individuals living in group quarters such as college dormitories, prisons, etc.

APPENDIX A: IMPLEMENTATION EVALUATION

The Implementation Evaluation in this section provides a high-level overview of the implementation of the first OneSpartanburg Vision Plan from its launch in January 2017 to the present. It seeks to identify areas where implementation activities have been successful, examples where clear progress remains to be achieved, and challenges and opportunities encountered during implementation.

This Appendix is not a tactic-by-tactic analysis of progress or a recitation of accomplishments that may be found in annual reports and scorecard data provided by OneSpartanburg, Inc. Instead, it focuses on high-level themes for the Steering Committee and OneSpartanburg, Inc. to consider as they determine the structure, content, and activation of the OneSpartanburg Vision Plan 2.0. It is based primarily on interviews with staff and volunteers involved with the first Vision Plan implementation effort as well as Broad Ripple Strategies' analysis of materials provided by OneSpartanburg, Inc.

OVERVIEW

An overall success. According to most stakeholders involved with the creation and/or activation of the first OneSpartanburg Vision Plan, the implementation effort had a positive overall impact on community and economic development in Spartanburg County. Input participants cited numerous successes, including but not limited to major economic development project wins, accelerated downtown development, progress on gateways and trails, the creation of the See Yourself in Spartanburg talent campaign, and more. Beyond the direct activation of tactics from the Vision Plan, stakeholders also said the implementation effort has had many indirect benefits, including enhanced staff and organizational capacity at OneSpartanburg, Inc. and a broader embrace of utilizing data and metrics in planning activities throughout the community.

Improved community pride. Stakeholders said that one of the most positive developments in Spartanburg County in recent years has been an increase in community pride. One way to assess community pride is to calculate a "Net Promoter Score." A Net Promoter Score is a common research metric where survey respondents are asked to rate on a scale of zero to 10 the likelihood that they would recommend something, typically a product, service, or brand, to a friend or colleague. Individuals who respond with a rating of 9 or 10 are categorized as "promoters" while respondents who answer zero to 6 are rated as "detractors." The Net Promoter Score is then calculated by subtracting the detractors from the promoters and indexing scores on a scale of -100 to +100, with positive scores considered good. Online survey respondents were asked to rate the likelihood that they would recommend Spartanburg County to a friend or colleague. Their responses worked out to a net promoter score of +7.9. While there is no historical baseline from which to draw comparisons, this is a positive finding considering that stakeholders reported significant challenges with community pride during the first Vision Plan process. Input participants said that the "positive vibes" in the community have many sources but that the Vision Plan played an important role. Said one individual, "There is an energy that you can feel in the community tying back to the Vision Plan."

Enhanced cross-sector collaboration paid dividends. Input participants reported that implementation of the first Vision Plan helped enhance a “culture of collaboration” among key organizations and entities in Spartanburg County. As primary examples, stakeholders cited the Bringing Back the Burg task force and current cross-sector conversations that are taking place around how to allocate funds from the American Rescue Plan. Input participants also noted the strong working relationship on issues of economic development between OneSpartanburg, Inc., the City of Spartanburg, and Spartanburg County.

100 percent investor retention. According to OneSpartanburg, Inc. all the public and private partners who pledged investment into the OneSpartanburg Vision Plan program followed through on 100 percent of their commitments. This is a powerful testament to the strength of the plan and the individuals and organizations who have worked tirelessly to implement it.

AREAS OF THE VISION PLAN 1.0 IN NEED OF ADDITIONAL PROGRESS

Entrepreneurship and small business development. Stakeholders said that relative to other areas of the Vision Plan, comparatively less progress occurred on Objective 2.2, “Cultivate a Dynamic Entrepreneurial Ecosystem.” Input participants said small business and entrepreneurship should continue to be an area of strategic focus for Spartanburg County but that a new program of work is needed along with clearly defined organizational leadership roles.

Knowledge-based and corporate business development. As discussed throughout the Competitive Assessment, stakeholders in Spartanburg County desire more knowledge-based and corporate jobs. While the community has seen fairly strong growth in knowledge-based occupations, input participants said progress on attracting “standalone” corporate projects and developing new Class A office space was slower than desired.

Continuing to advance long-term projects. Input participants also noted that many of the implementation “wins” from the first Vision Plan were smaller items that helped build capacity for the future. Said one stakeholder, “In the first go-round it was about hitting some singles. When we started turning our focus toward some of the big things we realized it was going to take more time.” Input participants said that while some progress has been made on infrastructure projects such as The Dan trail system, much more work is needed in the future. This is not unexpected, especially for a community implementing its first holistic Vision Plan. Some strategic priorities cannot be completed within a five-year timeframe. That said, it should be viewed as a positive that stakeholders in Spartanburg County are pushing hard to achieve results on major projects and initiatives.

IMPLEMENTATION STRUCTURE

A large, open-ended volunteer structure was a poor fit. Perhaps the biggest lesson learned during implementation is best summed up by a stakeholder who said, “The biggest thing that stalled momentum was the unwieldy volunteer structure.” The Implementation Plan developed as part of the first Vision Plan process called for a large network of volunteers to help advance various aspects of the plan; OneSpartanburg, Inc. was charged with managing this network. According to OneSpartanburg, Inc. stakeholders, however, this structure quickly became unworkable. The number of volunteers was simply too large to manage, and many participants, though well-intentioned, lacked subject-matter expertise and/or influence to effect change. OneSpartanburg, Inc. leadership recognized this challenge early on and pivoted to a more manageable structure for volunteer oversight of implementation led by the OneSpartanburg Vision Plan Advisory Board. Input participants credited the Advisory Board with helping to maintain momentum around the Vision Plan, particularly as the pandemic ground many other activities to a halt.

Staff-driven efforts led to success. Related to the preceding paragraph, stakeholders said that many of the biggest successes around the implementation effort were led by the staff of OneSpartanburg, Inc. and other public, private, and non-profit organizations in the community such as Partners for Active Living, local governments, and others. Input participants said they would like to see future implementation tasks be assigned primarily to the organizations and entities that have the capacity and ability to act, recognizing that additional resources may be required to accommodate any significant expansions of mandates or programs of work.

Finding the right balance for volunteer involvement and cross-sector collaboration. While the volunteer structure utilized at the outset of the implementation effort was ultimately unworkable, stakeholders said that volunteers should still play a role in strategic implementation. Input participants suggested two ways in which this should happen. First, stakeholders praised the OneSpartanburg Vision Plan Advisory Board as an effective way to maintain accountability across a range of organizations and sectors. Second, some input participants noted that it may be desirable to convene ad hoc small groups of individuals with common interests and/or expertise to advance a specific issue, disbanding once work is complete.

ADDITIONAL IMPLICATIONS FOR THE VISION PLAN 2.0

The importance of diversity and inclusion. Some input participants said there is a perception in the community that the OneSpartanburg Vision Plan was not sufficiently focused on economic inclusion and was not truly a “plan for everyone.” Other input participants disagreed and said that significant efforts have been made to make the Vision Plan and its implementation as inclusive as possible. The fact that both viewpoints exist in the community suggests that there are, at a minimum, “disconnects” that must be addressed if the community’s strategic plan is to reach its full potential.

Emphasizing major projects and high-impact initiatives. Stakeholders said that the way that tactical recommendations were presented in the first Vision Plan caused some confusion. Specifically, major projects involving large capital investments such as a reimagining of Morgan Square were presented with roughly the same emphasis as a recommendation to continue standard economic development programming with only limited revisions. Input participants said they would like to see the Vision Plan 2.0 better delineate between big and small tasks.

Increased staff capacity may be necessary in some areas. Regardless of the exact contents of the Vision Plan 2.0, stakeholders said it may be necessary to provide greater “bandwidth” to key organizations and entities involved in community and economic development that are already running close to capacity. Said one individual, “Right now, all we can do is manage the incoming.” Input participants said OneSpartanburg, Inc. and local governments in particular would benefit from additional professional staff to help more proactively seek out opportunities related to key strategic priorities and speed up responses to unexpected developments (positive or negative) that require quick action.

Clearly communicating the Vision Plan 2.0 to internal and external audiences. Input participants praised the communications and marketing capacity that OneSpartanburg, Inc. and its partners have developed in recent years. Stakeholders said that they feel there is additional room for growth, however, when it comes to awareness of the Vision Plan in the community. One challenge that some input participants pointed out is potential confusion between OneSpartanburg, Inc. the organization and the OneSpartanburg Vision Plan – a broader strategic initiative managed by OneSpartanburg, Inc. but implemented in collaboration with a network of partners for the benefit of the community. Stakeholders said this factor along with numerous other strategic initiatives in the community can create confusion both inside and outside of Spartanburg County. Said one individual, “Because we are partnering so much and in so many different ways, that can create some ‘market confusion’ in terms of who is doing what, who is taking the lead.”

A desire to “be bold.” Above all, stakeholders in Spartanburg County said they believe the community can be even bolder with its next Vision Plan. Said one input participant, “There are things that people might look at and say, ‘there is no way that will ever happen in Spartanburg or South Carolina’ ... I’m not a believer. It might not happen overnight but there are ways that we can create a narrative that we need to use the data, using the correct framing” to get big things done.